

## Chapter 3

# Web Access

---

- 3.1      Web Access Overview**
- 3.2      Menu**
- 3.3      Messages**
- 3.4      Financial Aid**
- 3.5      Organization**
- 3.6      Reporting**
- 3.7      Transfer Monitoring**



## Contents

### Chapter 3: Web Access

|  |      |
|--|------|
| 3.1 Web Access Overview .....                            | 3-1  |
| 3.1.1 Navigation .....                                   | 3-4  |
| 3.1.2 Help .....   | 3-5  |
| 3.2 Menu .....   | 3-6  |
| 3.2.1 Change Password .....                              | 3-6  |
| 3.2.2 System Requirements .....                          | 3-7  |
| 3.2.3 Contact Us .....                                   | 3-9  |
| 3.2.4 FAQ .....  | 3-10 |
| 3.3 Messages .....                                       | 3-12 |
| 3.4 Financial Aid .....                                  | 3-13 |
| 3.4.1 Loan History .....                                 | 3-14 |
| 3.4.1.1 Borrower Name History .....                      | 3-17 |
| 3.4.1.2 Borrower SSN History .....                       | 3-18 |
| 3.4.1.3 Loan Detail .....                                | 3-19 |
| 3.4.2 Overpayment History .....                          | 3-27 |
| 3.4.2.1 Overpayment Add .....                            | 3-30 |
| 3.4.2.2 Overpayment Add and Student Add .....            | 3-33 |
| 3.4.2.3 Overpayment Display .....                        | 3-37 |
| 3.4.2.3.1 Overpayment Update .....                       | 3-40 |
| 3.4.2.3.2 Overpayment Delete Confirmation .....          | 3-42 |
| 3.4.3 Pell Grant History .....                           | 3-43 |
| 3.4.4 Enrollment History .....                           | 3-45 |
| 3.4.5 Enrollment Update .....                            | 3-46 |
| 3.4.6 Student Access Interface .....                     | 3-48 |
| 3.5 Organization .....                                   | 3-49 |
| 3.5.1 Organization Contact List .....                    | 3-50 |
| 3.5.1.1 Organization Contact Detail .....                | 3-52 |
| 3.5.1.1.1 Organization Contact Update .....              | 3-54 |
| 3.5.1.1.2 Organization Contact Delete Confirmation ..... | 3-56 |
| 3.5.1.2 Organization Contact Add .....                   | 3-57 |
| 3.5.2 Organization Search .....                          | 3-60 |
| 3.5.2.1 Organization Search Pop-Up Window .....          | 3-62 |
| 3.5.3 SSCR Cycle Selection .....                         | 3-64 |
| 3.5.4 Data Provider Schedule .....                       | 3-66 |
| 3.5.5 Repayment Information .....                        | 3-68 |
| 3.5.6 Cohort Default Rate History List .....             | 3-70 |
| 3.5.7 School Profile .....                               | 3-73 |
| 3.6 Reporting .....                                      | 3-74 |
| 3.6.1 Report List .....                                  | 3-75 |
| 3.6.1.1 Report Parameters .....                          | 3-77 |
| 3.6.1.2 Report Log .....                                 | 3-79 |

|  |       |
|--|-------|
| 3.7 Transfer Monitoring.....                 | 3-81  |
| 3.7.1 Transfer Monitoring List.....          | 3-83  |
| 3.7.1.1 Student Monitoring Add .....         | 3-85  |
| 3.7.1.2 Student Monitoring Detail .....      | 3-87  |
| 3.7.1.2.1 Student Monitoring Update.....     | 3-89  |
| 3.7.1.2.2 Student Monitoring Delete.....     | 3-91  |
| 3.7.2 Monitoring Alert Review .....          | 3-92  |
| 3.7.3 School Transfer Profile .....          | 3-96  |
| 3.7.3.1 School Transfer Profile Add .....    | 3-98  |
| 3.7.3.2 School Transfer Profile Update ..... | 3-100 |

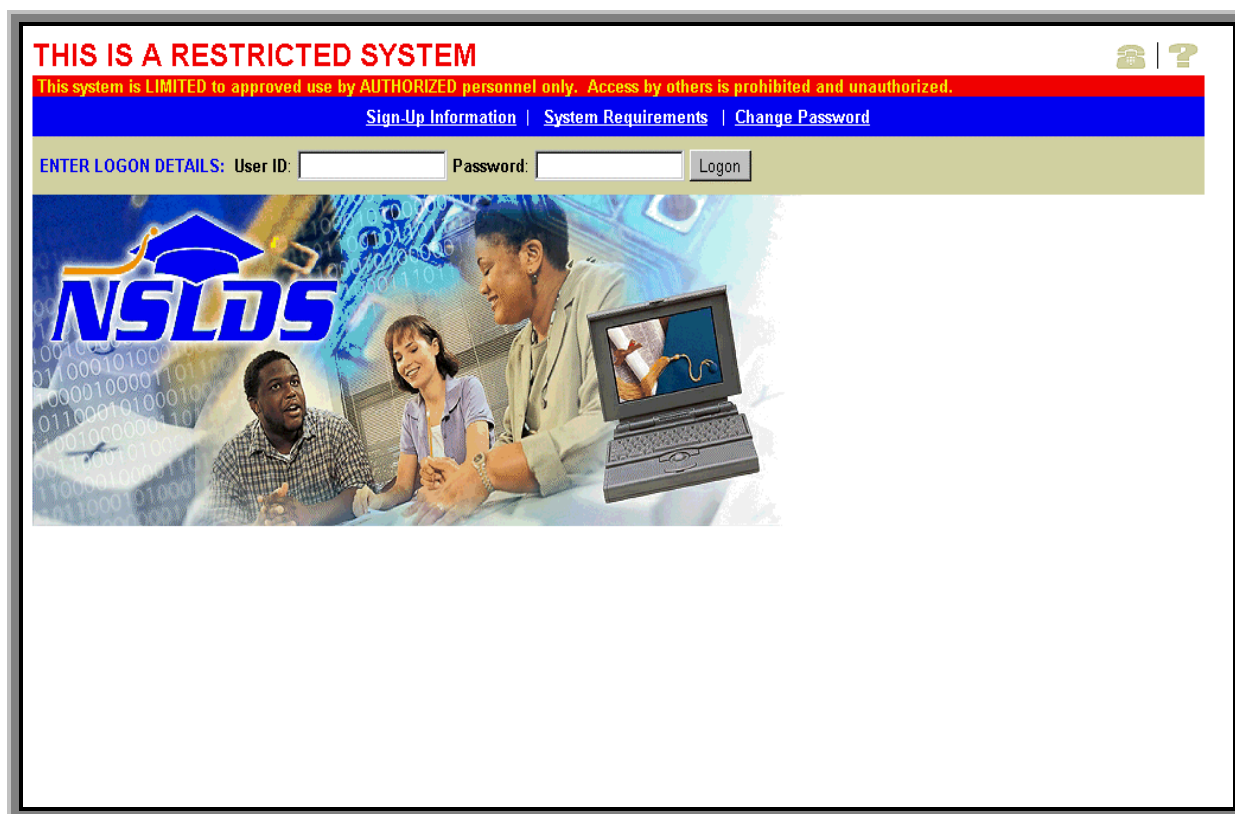
## Figures

|   |    |
|---|----|
| Figure 3-1, Logon .....                                     | 1  |
| Figure 3-2, Privacy Act .....                               | 2  |
| Figure 3-3, Menu .....                                      | 3  |
| Figure 3-4, Change Password .....                           | 6  |
| Figure 3-5, System Requirements .....                       | 8  |
| Figure 3-6, Contact Us .....                                | 9  |
| Figure 3-7, Frequently Asked Questions, 1 of 2 .....        | 10 |
| Figure 3-8, Frequently Asked Questions, 2 of 2 .....        | 11 |
| Figure 3-9, Message Detail .....                            | 12 |
| Figure 3-10, Financial Aid Diagram .....                    | 13 |
| Figure 3-11, Loan History .....                             | 15 |
| Figure 3-12, Borrower Name History .....                    | 17 |
| Figure 3-13, Borrower SSN History .....                     | 18 |
| Figure 3-14, Loan Detail .....                              | 20 |
| Figure 3-15, Overpayment History .....                      | 29 |
| Figure 3-16, Overpayment Add .....                          | 32 |
| Figure 3-17, Overpayment Add and Student Add .....          | 36 |
| Figure 3-18, Overpayment Display .....                      | 39 |
| Figure 3-19, Overpayment Update .....                       | 41 |
| Figure 3-20, Overpayment Delete Confirmation .....          | 42 |
| Figure 3-21, Pell Grant History .....                       | 44 |
| Figure 3-22, Enrollment History .....                       | 45 |
| Figure 3-23, Enrollment Update .....                        | 47 |
| Figure 3-24, Student Access Interface .....                 | 48 |
| Figure 3-25, Organization Diagram .....                     | 49 |
| Figure 3-26, Organization Contact List .....                | 51 |
| Figure 3-27, Organization Contact Detail .....              | 53 |
| Figure 3-28, Organization Contact Update .....              | 55 |
| Figure 3-29, Organization Contact Delete Confirmation ..... | 56 |
| Figure 3-30, Organization Contact Add .....                 | 59 |
| Figure 3-31, Organization Search .....                      | 61 |
| Figure 3-32, Organization Search Pop-Up Window .....        | 63 |
| Figure 3-33, SSCR Cycle Selection .....                     | 65 |
| Figure 3-34, Data Provider Schedule .....                   | 67 |
| Figure 3-35, Repayment Information .....                    | 69 |
| Figure 3-36, Cohort Default Rate History List .....         | 72 |
| Figure 3-37, School Profile .....                           | 73 |
| Figure 3-38, Report Diagram .....                           | 74 |
| Figure 3-39, Report List .....                              | 76 |
| Figure 3-40, Report Parameters .....                        | 78 |
| Figure 3-41, Report Log .....                               | 80 |
| Figure 3-42, Transfer Monitoring Diagram .....              | 81 |
| Figure 3-43, Transfer Monitoring List .....                 | 84 |



|  |     |
|--|-----|
| Figure 3-44, Student Monitoring Add .....        | 86  |
| Figure 3-45, Student Monitoring Detail.....      | 88  |
| Figure 3-46, Student Monitoring Update.....      | 90  |
| Figure 3-47, Student Monitoring Delete.....      | 91  |
| Figure 3-48, Monitoring Alert Review .....       | 93  |
| Figure 3-49, Loan Detail.....                    | 94  |
| Figure 3-50, Pell Grant History.....             | 95  |
| Figure 3-51, School Transfer Profile .....       | 97  |
| Figure 3-52, School Transfer Profile Add .....   | 99  |
| Figure 3-53, School Transfer Profile Update..... | 101 |

## 3.1 Web Access Overview

The NSLDS Financial Aid Professional Web site can be found at [www.nslsdfap.ed.gov](http://www.nslsdfap.ed.gov). At the Logon page (Figure 3-1), enter User ID and Password, then click Logon. See Chapter 2 for information on obtaining a User ID and Password.



*Figure 3-1, Logon*

You may get system requirements information or change your password before logging on by clicking the appropriate link. For general logon help and tips, click the  icon. For further help, click the  icon, which displays the Contact Us page. This page displays the Customer Service Center phone number, 1-800-999-8219, and e-mail address, [nsldscoe@raytheon.com](mailto:nsldscoe@raytheon.com).

The next page reminds you of the Privacy Act (Figure 3-2) responsibilities and requires your acknowledgment at each logon by clicking the I Agree button at the bottom of the page.

**NSLDS**

Logged on as: LISA LAYDEN

### Privacy Act

**REMINDER**

Privacy Act Requirement

This is a Government system, to be used by authorized personnel only. If you use this computer system, you should understand that all activities may be monitored and recorded by automated processes and/or by Government personnel. Anyone using this system expressly consents to such monitoring. Warning: If such monitoring reveals possible evidence of criminal activity, monitoring records may be provided to law enforcement officials.

This system contains personal information protected by the Privacy Act of 1974 (as amended). If you use this computer system, you are explicitly consenting to be bound by the Act's requirements and acknowledge the possible criminal and civil penalties for violation of the Act.

If for any reason you are unsure you should use this system or have questions about the Privacy Act, click here and contact NSLDS Customer Service for assistance

Cancel and Logout

By clicking here, you *personally* confirm that you are currently an authorized user of NSLDS and that you adhere to the Privacy Act.

I Agree

*Figure 3-2, Privacy Act*

After logging on successfully, the Menu page appears (Figure 3-3). Messages, on the left, contain updates or news affecting the entire user community. On the right, Financial Aid, Organization, Reporting, and Transfer Monitoring appear. Some menu categories contain links to other information (e.g., under Financial Aid, you can click Loan History.)

### ***Disclaimer***

ED staff has access to most of the functions that are available. However, some functions are limited to those users who have a need for them. **The Transfer Monitoring pages and other pages are only available and viewable to school users (i.e., the Tran menu tab only appears for school users).**



The screenshot displays the NSLDS web application interface. At the top, the NSLDS logo is on the left, and navigation links for Menu, Aid, Org, Report, and Tran are in the center. On the right, there are icons for a phone, help, and a close button. Below the navigation bar, a blue banner contains links: Menu | Change Password | System Requirements | Contact Us | FAQ. A yellow banner below that shows the user is logged on as 'DUMMY SCHOOL ID FOR TRAINING' from 'RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE'.

The main content area is divided into several sections:

- Messages:** Features an image of a mailbox and a note stating: 'Only the first line of each message is displayed. To see the complete message, click on the message text above.'
- Financial Aid:** Includes a header image of a hand writing on a document. Below it are links: [Loan History](#) ♦ [Overpayment History](#) ♦ [Pell Grant](#) ♦ [Enrollment History](#) ♦ [Enrollment Update](#). There are input fields for SSN, First Name, and DOB, with a note: '(Enter details and click on a link above, DOB should be in MMDDCCYY format)'. The DOB field is currently empty.
- Organization:** Features an image of a university building. Below it are links: [Org Contact List](#) ♦ [Org Search](#) ♦ [SSCR Cycle](#) ♦ [Data Provider Schedule](#) ♦ [Repayment Information](#). There are input fields for Type (a dropdown menu showing '--- Select ---'), Code, and Name, with a note: '(Enter details and click on a link above)'. The Name field is currently empty.
- Reporting:** Includes an image of a clipboard and a link: [Report List](#).
- Transfer Monitoring:** Includes an image of a university building and links: [Transfer Monitoring List](#) ♦ [Monitoring Alert Review](#) ♦ [School Transfer Profile](#).

Figure 3-3, Menu

For a quick start, enter a student's identifiers (i.e., SSN, First Name, and DOB) in the appropriate text boxes under Financial Aid and then click a link.

### 3.1.1 Navigation






The Menu tabs always appear at the top of each page:

- **Menu** for the main pages of the NSLDS Web site
- **Aid** for the Financial Aid pages
- **Org** for the Organization pages
- **Report** for the Reporting page
- **Tran** for the Transfer Monitoring pages



Below each tab, you can click on other links to view relevant information. **Error! Reference source not found.** shows how the Web pages flow.

### 3.1.2 Help

To answer general questions about this site, a Help system is available to assist you. You can get system-level help by clicking the graphical symbols in the upper right-hand corner of every page. If you are having trouble getting started, remember that this site works best when you use either the Netscape (version 4.0 or higher) browser or the Microsoft Internet Explorer (version 4.0 or higher) browser. You can call the Customer Service Center at 1-800-999-8219 if you have any problems.

- Clicking the  icon takes you to the NSLDS Customer Service Center page with contact information.
- Clicking the  icon takes you to a Help page. These icons appear in areas where you may have questions. From Help:
  - Clicking the  icon takes you to the glossary of NSLDS Web site terms.
  - Clicking the  icon takes you to Print. (This icon appears from the Netscape browser only.)
- Clicking the  icon logs you out and returns you to the Logon page.

The following icons also may appear:

-  icon alerts you to factors that can affect a student's eligibility.
-  icon identifies information that is useful but not critical.

## 3.2 Menu

### 3.2.1 Change Password

The Change Password page (Figure 3-4) allows you to change your current password and can be accessed from either the Logon page or the Menu page. This page shows how many days are left until the password expires.

Passwords are subject to the following rules:

- Passwords must be six to eight characters in length.
- At least one character must be a number.
- The first character must be a letter.
- New passwords must be different from the last four passwords you have used.
- Passwords are valid for 120 days.
- After three unsuccessful logon attempts, your access to the NSLDS is revoked.

To discuss any problems accessing the NSLDS, call the Customer Service Center at 1-800-999-8219, Monday through Friday, from 8 a.m. to 8 p.m. ET.

NSLDS

System Requirements

Logged on as: LISA LAYDEN from [Department of Education Region 0](#)

Return to Previous Page

### Change Password

**Please Enter Details**

User Id:

Current Password:

New Password:

Confirm Password:

Change Password

*Figure 3-4, Change Password*

### **3.2.2 System Requirements**

The System Requirements page (Figure 3-5) describes the system requirements for the NSLDS Web site. You need the Microsoft Internet Explorer (version 4.0 or higher) browser or the Netscape (version 4.0 or higher) browser. If you do not have one of these browsers, you must download one. To provide a higher level of security, it is recommended that you use the 128-bit version of the browser.

**NSLDS**

Logged on as: LISA LAYDEN from [Department of Education Region 0](#)

[Return to Previous Page](#)

## System Requirements

To use NSLDS, you need one of the following supported browsers from Microsoft or Netscape. If you do not have one of these, you will need to download one. To provide a higher level of security, it is recommended that you use the 128-bit version of the browser. For more information regarding security, [go here](#).

To identify the version of the browser that you are currently using, use the **Help** menu item on your browser and select **About browser name**.

If you still have questions, please [Contact NSLDS](#).

*It is not possible to access NSLDS unless you have one of these browsers.*

### Microsoft Internet Explorer

|                           |   |
|---------------------------|---|
| <b>Supported Versions</b> | <b>Versions 4.xx, 5.0 and higher.</b><br>NSLDS has been tested with versions up to and including 5.0. If you have a later version than this, you may have problems. It is recommended that you use one of the versions specified above. |
| <b>Download</b>           | To download a Microsoft browser, use this link.<br><a href="http://www.microsoft.com/ie/">www.microsoft.com/ie/</a><br>It is recommended that you download the 128-bit version. To learn more about security <a href="#">go here</a> .  |
| <b>Configuration</b>      | For help with the configuration of Microsoft I.E. browsers, use this link <a href="#">NSLDS I.E. configuration</a> .  |

### Netscape Navigator

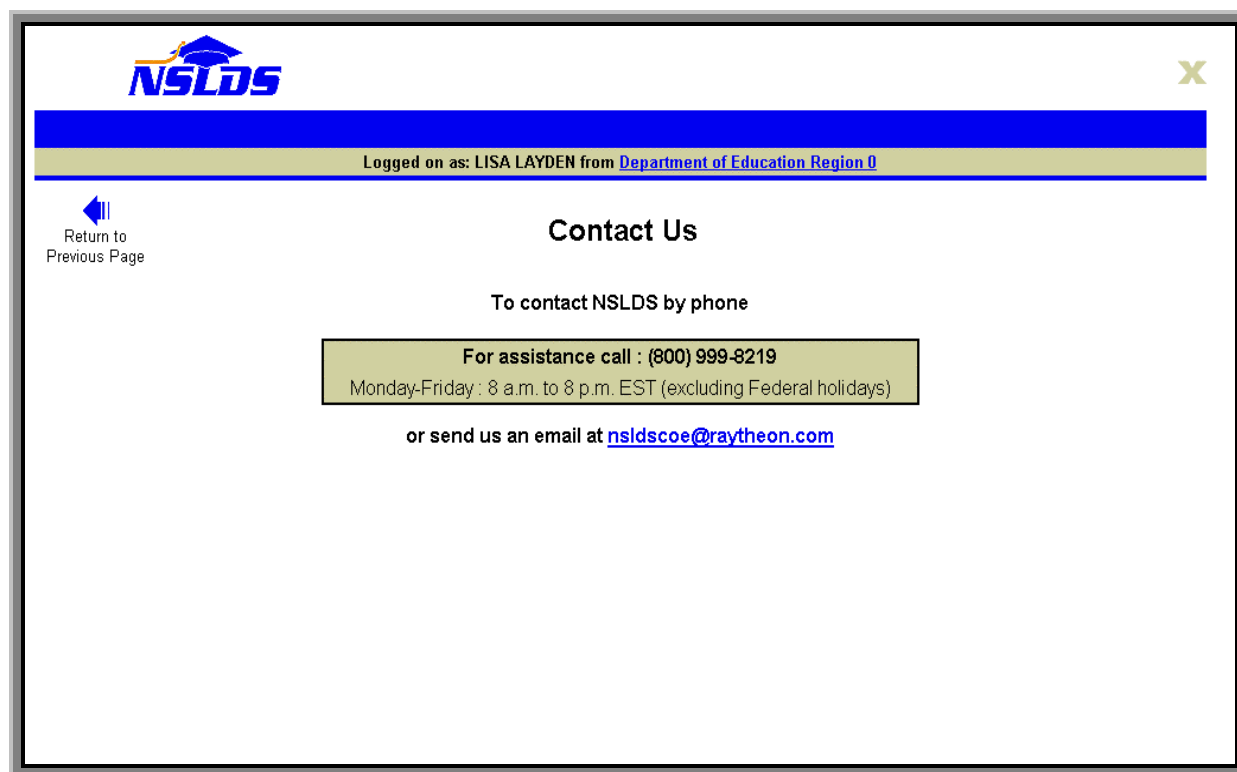
|                           |   |
|---------------------------|---|
| <b>Supported Versions</b> | <b>Versions 4.xx and higher.</b><br>NSLDS has been tested with versions up to and including 4.6. If you have a later version than this, you may have problems. It is recommended that you use one of the versions specified above.              |
| <b>Download</b>           | To download a Netscape browser, use this link.<br><a href="http://www.netscape.com/download/">www.netscape.com/download/</a><br>It is recommended that you download the 128-bit version. To learn more about security <a href="#">go here</a> . |
| <b>Configuration</b>      | For help with the configuration of Netscape browsers, use this link <a href="#">Netscape configuration</a> .  |

Figure 3-5, System Requirements

In addition, the browser must be capable of encrypting transmissions between your computer and the NSLDS. To do this the browser uses a form of encryption called Secure Socket Layer (SSL). Current browsers support 40-bit, 56-bit, and 128-bit encryption (128-bit is the most secure). The NSLDS can operate with any of these encryption levels. For more details about security, see Security under System Requirements.

### 3.2.3 Contact Us

The Contact Us page (Figure 3-6) provides contact with the NSLDS by telephone or by e-mail. To contact the NSLDS for assistance by phone, call 1-800-999-8219. Or, e-mail us at [nsldscoe@raytheon.com](mailto:nsldscoe@raytheon.com).



*Figure 3-6, Contact Us*

## 3.2.4 FAQ

There are five categories of FAQs (Frequently Asked Questions) (Figure 3-7):

- About the National Student Loan Data System (NSLDS)
- Technical/Browser questions
- Access questions
- Problem questions
- Printing questions

Each category includes a list of FAQs relating to that topic. Select your question from the appropriate category and click on it to view the answer (Figure 3-8).

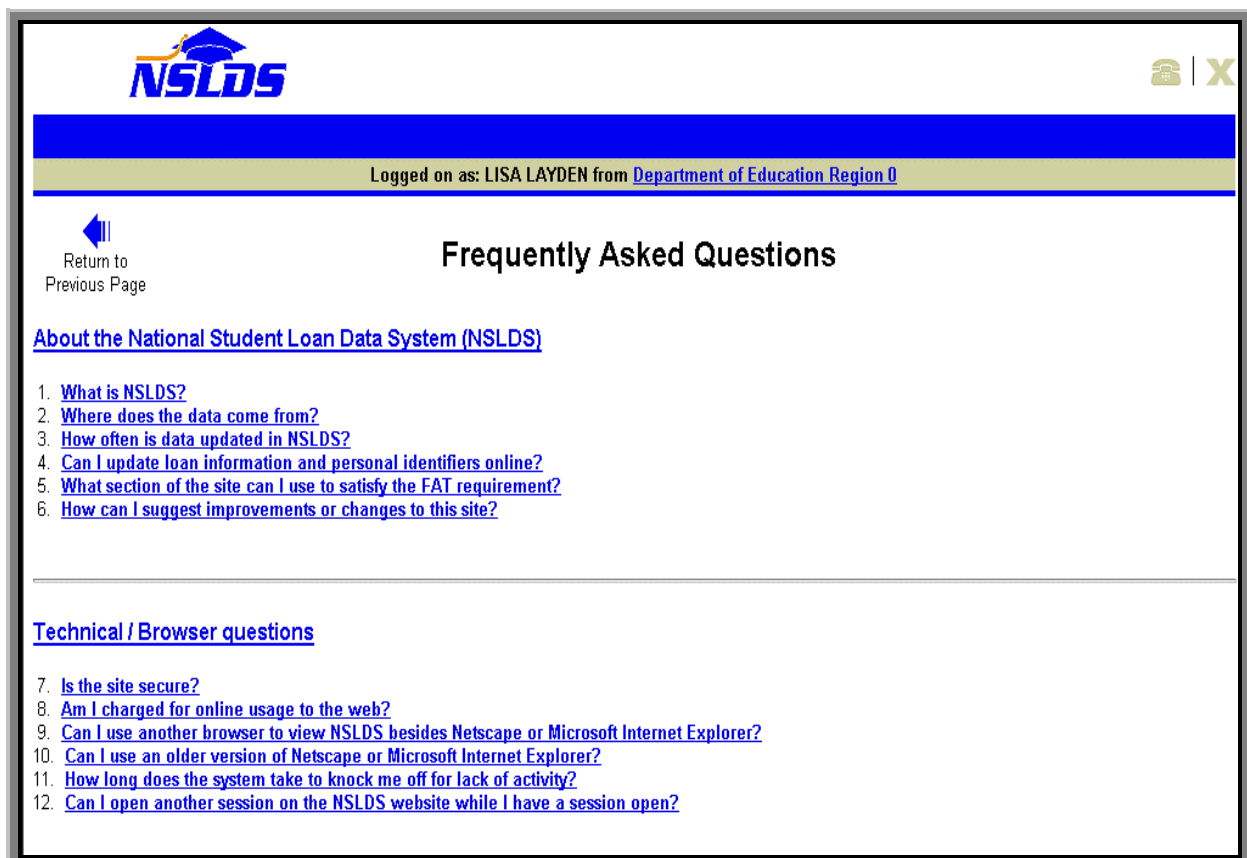


Figure 3-7, Frequently Asked Questions, 1 of 2



## About the National Student Loan Data System (NSLDS)

### 1. What is NSLDS?

The National Student Loan Data System (NSLDS) is the national database of information about loans and grants awarded to students under Title IV of the Higher Education Act (HEA) of 1964. NSLDS provides a centralized, integrated view of Title IV loans and grants during their complete life cycle, from aid approval through disbursement, repayment, delinquency and closure.

[Return to top of page](#)

### 2. Where does the data come from?

The Department of Education data sources include the:

- Federal Family Education Loan Program (FFELP), for information on defaulted federal student loans
- Federal Direct Loan Program (FDLP), for information on Federal Direct Student Loans
- Federal Pell Grant Program, for Pell Grant information
- Central Processing System (CPS), for applicant information
- Guaranty Agencies, Schools, and Lenders, for information on students, loans, and grants

[Return to top of page](#)

### 3. How often are data updated in NSLDS?

GAs, schools, FDLP, and FFEL report loan information monthly. The Central Processing System and the Federal Pell Grant Program report information daily. Schools, or their servicers, report overpayments within 30 days of discovery of the overpayment.

*Figure 3-8, Frequently Asked Questions, 2 of 2*

## 3.3 Messages

The Messages section on the Menu page displays the current news and updates for the user community. To read the entire message, click it, and the browser displays that message in full on the Message Detail page (Figure 3-9).

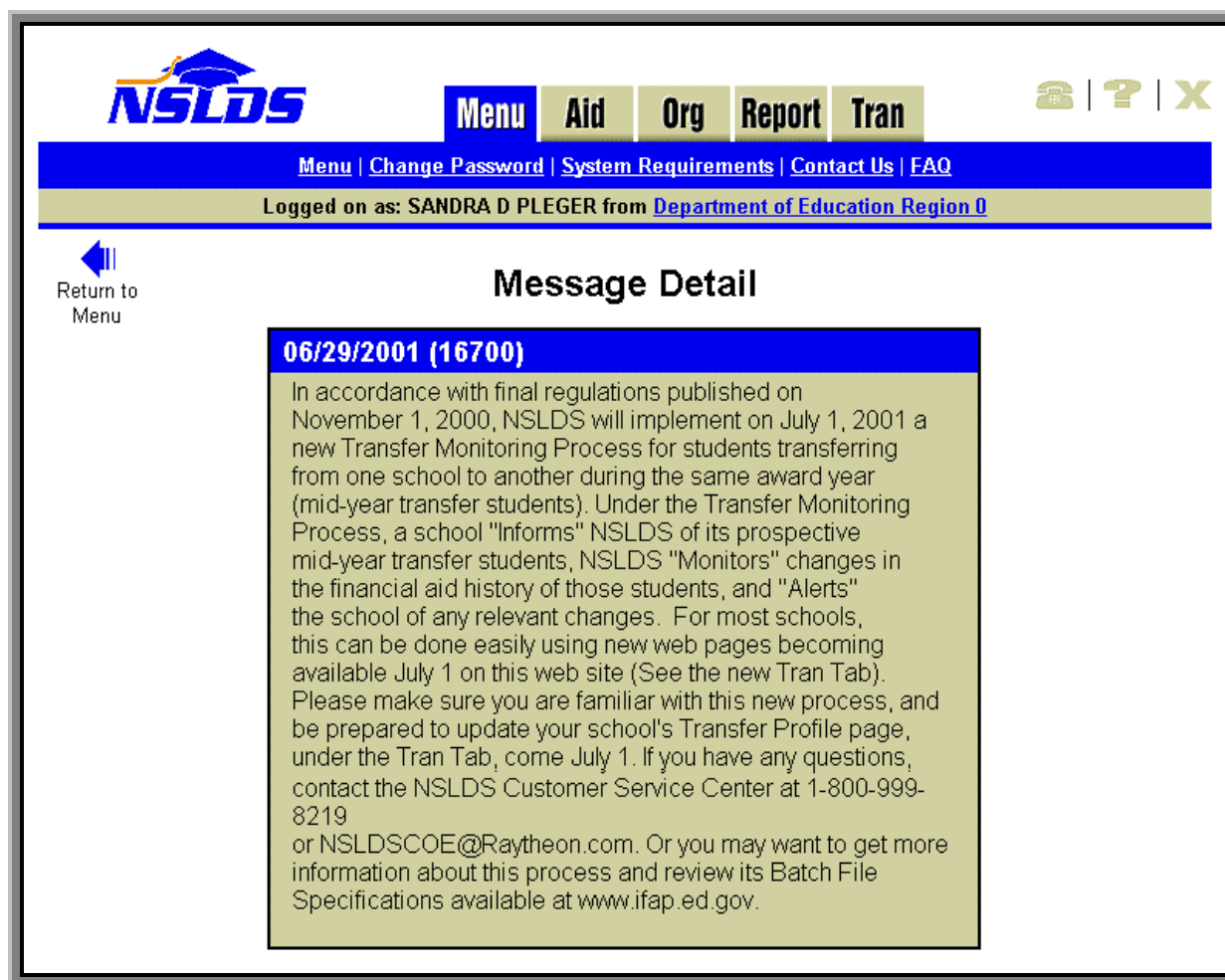


Figure 3-9, Message Detail

## 3.4 Financial Aid

The Financial Aid pages allow you to link to information about Title IV loans and grants. They provide detailed information about the borrower's loans and grants, and student enrollment status.

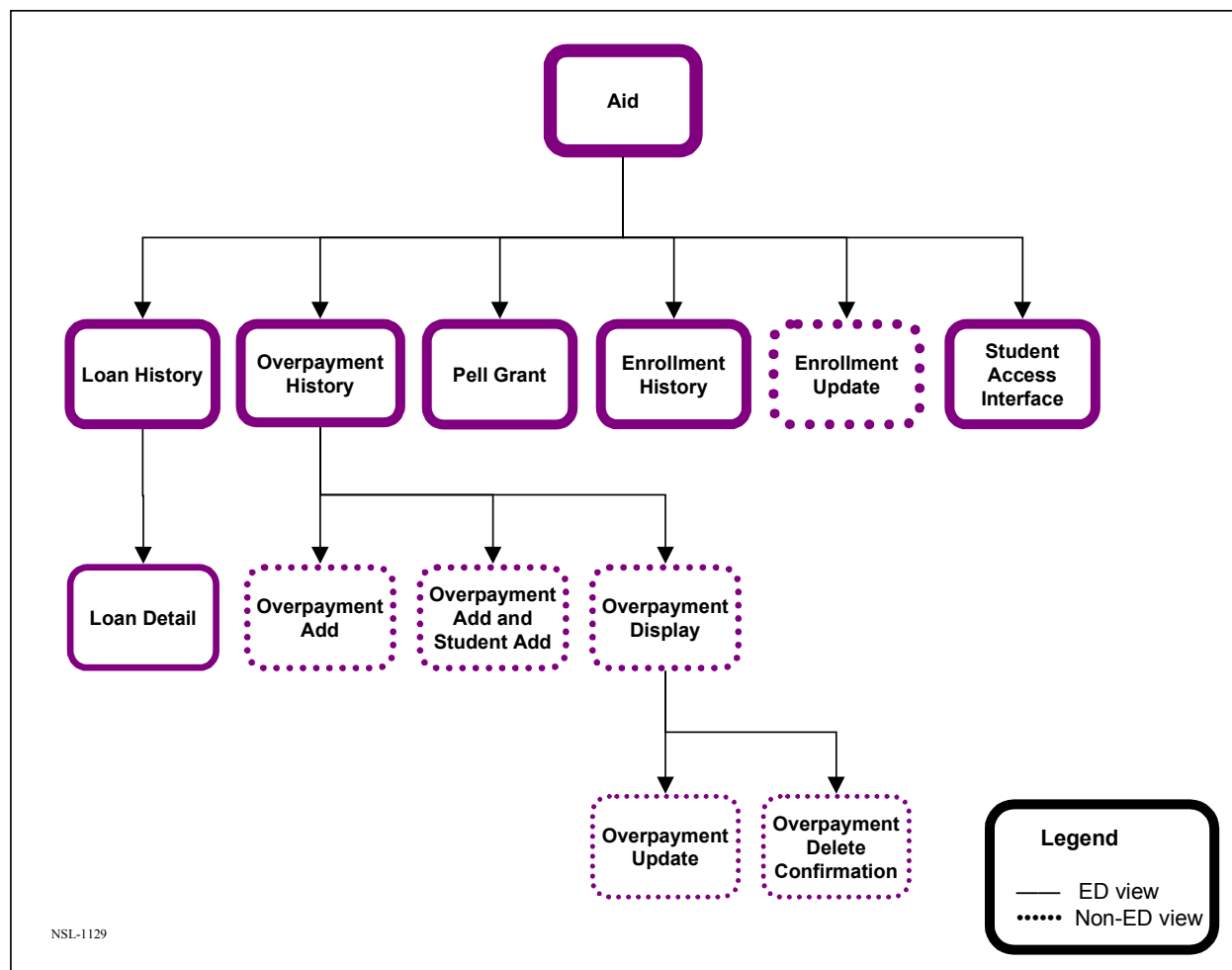


Figure 3-10, Financial Aid Diagram

### 3.4.1 Loan History

The Loan History page (Figure 3-11) lists all associated aggregate loan information and loan summaries including PLUS loans for a student. If a student is subject to one or more conditions that affect future aid eligibility, a red exclamation mark displays immediately below the student's identifiers at the top of the page. These exclamation marks indicate negative conditions, such as default, that affect a student's eligibility.

[Menu](#)
[Aid](#)
[Org](#)
[Report](#)
[Tran](#)

[Loan History](#) | [Overpayment History](#) | [Pell Grant](#) | [Enrollment History](#) | [Enrollment Update](#)

SSN:  First Name:  DOB:  (MMDDCCYY)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from TALLADEGA COLLEGE

JEANNINE A MARULLO  
 SSN: 043-78-2588      DOB: 01/08/1955

Student is not on your school's Transfer Monitoring List.

Pell Grants

### Aggregate Loan Information

| Loan Type          | Outstanding Principal Balance (OPB) | Pending Disbursements | Total    |
|--------------------|-------------------------------------|-----------------------|----------|
| Subsidized Loans   | \$15,100                            | N/A                   | \$15,100 |
| Unsubsidized Loans | N/A                                 | N/A                   | N/A      |
| Combined Loans     | \$15,100                            | N/A                   | \$15,100 |
| FFEL Consolidation | N/A                                 |                       | N/A      |
| Perkins            | \$450                               |                       | \$450    |

---

### Master Promissory Notes

Direct Loans: N
FFEL: N/A

---

### Loan Summary

Sort by:

Display Only:

Currently Sorted by LOAN DATE, No filtering

| SF - FFEL STAFFORD SUB                 |   | Status: ID as of 09/03/1996 |           |
|--|---|-----------------------------|-----------|
| UNIVERSITY OF MAINE - MACHIAS 00205500 |   |                             |           |
| Guaranteed Amt:                        | \$5,500                                   | Disbursed Amt:              | \$2,750   |
| Loan Date:                             | 08/16/1996                                | Sep. Loan Ind:              | A         |
| GA:                                    | 723 - MAINE EDUCATION ASSISTANCE DIVISION |                             | Acad. Lv: |
| Lender:                                | 805736 - MACHIAS SAVINGS BANK             |                             |           |
| OPB:                                   | \$2,750                                   | Agg OPB:                    | \$2,750   |
| Loan Period:                           | 09/03/1996 - 05/09/1997                   |                             |           |

| SF - FFEL STAFFORD SUB                 |   | Status: ID as of 01/16/1996 |           |
|--|---|-----------------------------|-----------|
| UNIVERSITY OF MAINE - MACHIAS 00205500 |   |                             |           |
| Guaranteed Amt:                        | \$2,750                                   | Disbursed Amt:              | \$2,750   |
| Loan Date:                             | 01/03/1996                                | Sep. Loan Ind:              | A         |
| GA:                                    | 723 - MAINE EDUCATION ASSISTANCE DIVISION |                             | Acad. Lv: |
| Lender:                                | 805736 - MACHIAS SAVINGS BANK             |                             |           |
| OPB:                                   | \$2,750                                   | Agg OPB:                    | \$2,750   |
| Loan Period:                           | 01/16/1996 - 05/10/1996                   |                             |           |

| SF - FFEL STAFFORD SUB                 |   | Status: DA as of 01/16/1996 |           |
|--|---|-----------------------------|-----------|
| UNIVERSITY OF MAINE - AUGUSTA 00676000 |   |                             |           |
| Guaranteed Amt:                        | \$1,725                                   | Disbursed Amt:              | \$1,725   |
| Loan Date:                             | 10/10/1994                                | Sep. Loan Ind:              | A         |
| GA:                                    | 723 - MAINE EDUCATION ASSISTANCE DIVISION |                             | Acad. Lv: |
| Lender:                                | 805736 - MACHIAS SAVINGS BANK             |                             |           |
| OPB:                                   | \$1,725                                   | Agg OPB:                    | \$1,725   |
| Loan Period:                           | 09/06/1994 - 05/12/1995                   |                             |           |

| PI - FEDERAL PERKINS                   |   | Status: ID as of 09/01/1993 |           |
|--|---|-----------------------------|-----------|
| UNIVERSITY OF MAINE - MACHIAS 00205500 |   |                             |           |
| Approved Amt:                          | \$450                                     | Disbursed Amt:              | \$450     |
| Loan Date:                             | 09/01/1993                                | Sep. Loan Ind:              |           |
| GA:                                    | 723 - MAINE EDUCATION ASSISTANCE DIVISION |                             | Acad. Lv: |
| Lender:                                | 805736 - MACHIAS SAVINGS BANK             |                             |           |
| OPB:                                   | \$450                                     | Agg OPB:                    | \$450     |
| Loan Period:                           | 09/01/1992 - 12/31/1995                   |                             |           |

| SF - FFEL STAFFORD SUB                 |   | Status: RP as of 11/13/1995 |           |
|--|---|-----------------------------|-----------|
| UNIVERSITY OF MAINE - MACHIAS 00205500 |   |                             |           |
| Guaranteed Amt:                        | \$2,625                                   | Disbursed Amt:              | \$2,625   |
| Loan Date:                             | 07/27/1993                                | Sep. Loan Ind:              | A         |
| GA:                                    | 723 - MAINE EDUCATION ASSISTANCE DIVISION |                             | Acad. Lv: |
| Lender:                                | 805736 - MACHIAS SAVINGS BANK             |                             |           |
| OPB:                                   | \$2,625                                   | Agg OPB:                    | \$2,625   |
| Loan Period:                           | 09/08/1993 - 05/13/1994                   |                             |           |

| SF - FFEL STAFFORD SUB                 |   | Status: DA as of 01/16/1996 |           |
|--|---|-----------------------------|-----------|
| UNIVERSITY OF MAINE - MACHIAS 00205500 |   |                             |           |
| Guaranteed Amt:                        | \$2,625                                   | Disbursed Amt:              | \$2,625   |
| Loan Date:                             | 09/21/1992                                | Sep. Loan Ind:              | A         |
| GA:                                    | 723 - MAINE EDUCATION ASSISTANCE DIVISION |                             | Acad. Lv: |
| Lender:                                | 805736 - MACHIAS SAVINGS BANK             |                             |           |
| OPB:                                   | \$2,625                                   | Agg OPB:                    | \$2,625   |
| Loan Period:                           | 09/09/1992 - 05/15/1993                   |                             |           |

| SF - FFEL STAFFORD SUB                 |   | Status: DA as of 01/16/1996 |           |
|--|---|-----------------------------|-----------|
| UNIVERSITY OF MAINE - MACHIAS 00205500 |   |                             |           |
| Guaranteed Amt:                        | \$2,625                                   | Disbursed Amt:              | \$2,625   |
| Loan Date:                             | 11/13/1991                                | Sep. Loan Ind:              | A         |
| GA:                                    | 723 - MAINE EDUCATION ASSISTANCE DIVISION |                             | Acad. Lv: |
| Lender:                                | 805736 - MACHIAS SAVINGS BANK             |                             |           |
| OPB:                                   | \$2,625                                   | Agg OPB:                    | \$2,625   |
| Loan Period:                           | 09/04/1991 - 05/15/1992                   |                             |           |

PRIVACY ACT OF 1974 (AS AMENDED)

Figure 3-11, Loan History

If you see a blue 'H' icon, the History icon, next to a borrower's name or SSN, click the 'H' to view the borrower's name or SSN history. You can scroll down the page to see the following sections:

The **Aggregate Loan Information** (Figure 3-11) shows aggregate loan amounts for the student. These aggregate amounts are computed exactly the same way they are on the Institutional Student Information Record (ISIR).

The **Master Promissory Notes** (Figure 3-11) box indicates whether NSLDS has received notification that the student has a Master Promissory Note under Direct or FFEL loan programs.

The **Loan Summary** (Figure 3-11) shows information about all of the student's loans. If you need to sort the table, use the Sort By option box above the table. The Display Only option box lets you show only those loans that meet the criteria you select. Again, an exclamation mark in a text box indicates a condition that needs to be addressed. The legend for exclamation marks in Loan Summary is located at the bottom of the page.

Each loan in the **Loan Summary** has a numbered blue box in front of it. Click the numbered blue box to link to the Loan Detail page, where you can view specific information about that loan organized in the following tables: Detail, Amounts, Activity, Status Change, and Guaranty Agency/Lender/Lender Agent History.

### 3.4.1.1 Borrower Name History

The Borrower Name History page (Figure 3-12) can only be accessed by clicking the History icon next to the current Name on the Financial Aid pages. The Borrower Name History page lists name changes for a borrower in the NSLDS database. Name changes occur for various reasons, for example, when people change their last name because of marriage. The borrower's Name, Social Security Number, and Date of Birth display in the identifier box. In the table below the identifier box, you can view the history of first and last names provided to the NSLDS. These historical names are listed with the most recent first.

**NSLDS** Menu Aid Org Report Tran

[Loan History](#) | [Overpayment History](#) | [Pell Grant](#) | [Enrollment History](#) | [Enrollment Update](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TALLADEGA COLLEGE](#)

**TARA MARIE M NUNEZ**  
SSN: 043-90-6703 DOB: 02/16/1975

**Borrower Name History**

| First Name | Last Name | Middle Initial |
|------------|-----------|----------------|
| TARA MARIE | NUNEZ     | M              |
| TARA       | SEARLES   | M              |

[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-12, Borrower Name History

### 3.4.1.2 Borrower SSN History

The Borrower SSN History page (Figure 3-13) can only be accessed by clicking the History icon next to the current SSN on the Financial Aid pages. The borrower's Name, Social Security Number, and Date of Birth display in the identifier box. In the table below the identifier box, you can view the list of any associated Social Security Numbers the borrower has been identified with in the past. The historical SSNs are listed with the most recent first.

**NSLDS** Menu Aid Org Report Tran

[Loan History](#) | [Overpayment History](#) | [Pell Grant](#) | [Enrollment History](#) | [Enrollment Update](#)

Logged on as: SANDY PLEGER from [CRANBROOK ACADEMY OF ART](#)

**ALFREDA M MAKSOUD**  
SSN: 111-00-0010 DOB: 04/11/1960

**Borrower SSN History**

| SSN         |
|-------------|
| 111-00-0009 |
| 111-00-0010 |


[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-13, Borrower SSN History



### **3.4.1.3 Loan Detail**

The Loan Detail page (Figure 3-14) displays historical data for a loan. This data includes the loan detail; the loan amounts; the loan activity; the loan status; and the associated guaranty agency, lender, and servicer agent. Some sections of this page are dynamically built, and the page contents differ depending on the loan being viewed.




[Menu](#)
[Aid](#)
[Org](#)
[Report](#)
[Tran](#)


[Loan History](#) | [Overpayment History](#) | [Pell Grant](#) | [Enrollment History](#) | [Enrollment Update](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TALLADEGA COLLEGE](#)

[Return To Loan History](#)



**TARA MARIE M NUNEZ**  
 SSN: 043-90-6703      DOB: 02/16/1975

---


**Detail for Loan 2**


|                                |   |                               |     |
|--------------------------------|---|-------------------------------|-----|
| <b>Loan Type:</b>              | SF - FFEL STAFFORD SUB                      |                               |     |
| <b>Loan Period Start:</b>      | 08/29/1995                                  | <b>Academic Level:</b>        | 3   |
| <b>Loan Period End:</b>        | 05/16/1996                                  | <b>Data Provider Loan ID:</b> | N/A |
| <b>Date Entered Repayment:</b> | 11/22/1997                                  | <b>Separate Loan Ind:</b>     | A   |
| <b>Borrowed at OPEID:</b>      | 00258900                                    | <b>Interest Rate:</b>         | VAR |
| <b>Borrowed at Name:</b>       | <a href="#">UNIVERSITY OF NEW HAMPSHIRE</a> |                               |     |

---


**Amounts for Loan 2**


|                                       | Date       | Amount  |
|---------------------------------------|------------|---------|
| <b>Loan:</b>                          | 07/17/1995 | \$5,500 |
| <b>Outstanding Principal Balance:</b> | 09/30/1995 | \$5,500 |
| <b>Outstanding Interest:</b>          | 09/30/1995 | \$0     |

---


**Activity for Loan 2**


| Action Date          | Amount  |
|----------------------|---------|
| <b>Disbursements</b> |         |
| 01/04/1996           | \$2,750 |
| 08/16/1995           | \$2,750 |

---


**Status Changes for Loan 2**

| Date Changed | Status                         |
|--------------|--------------------------------|
| 08/29/1995   | ID : IN SCHOOL OR GRACE PERIOD |

---


**Guaranty Agency / Lender / Servicer Agent History**

| Start                  | End     | Code   | Name  |
|------------------------|---------|--------|---|
| <b>Guaranty Agency</b> |         |        |   |
| 07/17/1995             | CURRENT | 733    | <a href="#">NEW HAMPSHIRE HIGHER EDUCATION ASST.</a>    |
| <b>Lender</b>          |         |        |   |
| 07/17/1995             | CURRENT | 827288 | <a href="#">FIRST SAVINGS &amp; LOAN ASSOC. OF N.H.</a> |



[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-14, Loan Detail

The Detail for Loan table displays the following information:

- **Loan Type**—The type of Title IV award made with a formal agreement for repayment with interest. The Loan Types are defined as follows:

| Loan Type | Definition                             |
|-----------|--|
| CL        | FFEL Consolidated Loan                 |
| D1        | Direct Stafford Subsidized Loan        |
| D2        | Direct Stafford Unsubsidized Loan      |
| D4        | Direct PLUS Loan                       |
| D5        | Direct Consolidation Unsubsidized Loan |
| D6        | Direct Consolidation Subsidized Loan   |
| D7        | Direct Consolidation PLUS Loan         |
| DU        | National Defense Loan                  |
| EU        | Perkins Expanded Lending               |
| FI        | Federally Insured Student Loan (FISL)  |
| IC        | Income Contingent Loan (ICL)           |
| NU        | National Direct Student Loan (NDSL)    |
| PL        | FFEL PLUS Loan                         |
| PU        | Federal Perkins Loan                   |
| RF        | FFEL Refinanced Loan                   |
| SF        | FFEL Stafford Subsidized Loan          |
| SL        | Supplemental Loan                      |
| SU        | FFEL Stafford Unsubsidized Loan        |

- **Loan Period Start**—The beginning date of when classes are (or were) to begin for the period covered by the loan.
- **Loan Period End**—The ending date of when classes ended (or were to end) for the period covered by the loan.
- **Date Entered Repayment**—The date the student entered or is scheduled to enter repayment.
- **Borrowed at OPEID**—The eight-digit ED code for the school where the student was enrolled or accepted for enrollment at the time the loan was made.

- **Borrowed at Name**—The name of the school where the student was enrolled or accepted for enrollment at the time the loan was made. Click the name of the organization to link to its Organization Contact list.

**Note:**

*Default School for Consolidated Loans* is listed as a school name when the loan is an FFEL Consolidation Loan or Direct Consolidation Loan. This is in accordance with reporting requirements and has no bearing on the status of the loan. These loans may be entered into when a student completes his or her program of study at a particular school and wants to consolidate loans received at different schools.

- **Academic Level**—The student's academic level at the time the loan was provided. The codes are defined as follows:

| Code | Definition  |
|------|---|
| 1    | Freshman/First Year (including proprietary institution programs that are less than 1 year in duration)  |
| 2    | Sophomore/Second Year   |
| 3    | Junior/Third Year   |
| 4    | Senior/Fourth Year  |
| 5    | Fifth/Other Undergraduate (may include sixth year undergraduate and continuing education students)  |
| A    | First Year Graduate/Professional  |
| B    | Second Year Graduate/Professional   |
| C    | Third Year Graduate/Professional  |
| D    | Beyond Third Year Graduate/Professional   |
| G    | Graduate/Professional, year of study unknown  |
| N    | Not available (to be used only if the date of the first disbursement is prior to July 23, 1992, and data provider does not have required attribute) |

- **Data Provider Loan ID**—A code used by the data provider (Guaranty Agency, Direct Loan Servicer, Debt Collection Service, or Perkins school) for internal loan identification.
- **Separate Loan Ind**—An indicator used to differentiate among multiple loans of the same loan date for the same borrower or student attending the same school. This field is used mostly by Guaranty Agencies.
- **Interest Rate**—The interest rate that is applied to the loan. A variable interest rate is indicated by the abbreviation VAR.

The Amounts for Loan table displays the loan amount, outstanding principal balance, and outstanding interest:

- **Date:**
  - **Loan**—The date the loan was made.
  - **Outstanding Principal Balance**—The date the outstanding principal balance was updated.
  - **Outstanding Interest**—The date the outstanding interest balance was updated.
- **Amount:**
  - **Loan**—The original amount, before any cancellations.
  - **Outstanding Principal Balance**—The cumulative dollar value due on a loan. If the field is preceded by an exclamation mark, the amount may include capitalized interest.
  - **Outstanding Interest**—The cumulative accrued outstanding interest balance on the loan.

The Activity for Loan table displays the disbursement, cancellation, and refund events for each loan. The table includes each event's date and amount. If the loan has no event activity, the table displays a disbursement value of N/A (not available):

- **Action Date:**
  - **Disbursements**—The date that the latest loan disbursement was made.
  - **Canceled**—The date when all or part of the Title IV loan was canceled.
  - **Refunds**—The date that a lender received a refund from the school.
- **Amount:**
  - **Disbursements**—Amount of disbursements released to a borrower.
  - **Canceled**—The cumulative amount of the Title IV loan that was canceled.
  - **Refunds**—The amount of refund paid to a lender on a loan.

The Status Change for Loan table displays a history of the loan status code and the date the status became effective for the loan. The most current loan status and effective date are listed at the top of the list:

- **Date Changed**—The date a Loan Status became effective.

**Note:**

This date is not necessarily the date the status was reported to the NSLDS. A loan status may have changed but not been updated in the NSLDS for various reasons until months or years after the fact.

- **Status**—The two-character code and description indicating the status of a loan.

The Loan Status Codes are defined as follows:

| Loan Status Code | Definition   |
|------------------|--|
| AL               | Abandoned Loan   |
| BC               | Bankruptcy Claim, Discharged                             |
| BK               | Bankruptcy Claim, Active                                 |
| CA               | Canceled   |
| CS               | Closed School Discharge                                  |
| DA               | Deferred   |
| DB               | Defaulted, Then Bankrupt, Active, Chapter 13             |
| DC               | Defaulted, Compromise                                    |
| DD               | Defaulted, Then Died                                     |
| DE               | Death  |
| DF               | Defaulted, Unresolved                                    |
| DI               | Disability   |
| DK               | Defaulted, Then Bankrupt, Discharged, Chapter 13         |
| DL               | Defaulted, In Litigation                                 |
| DN               | Defaulted, Paid in Full Through Consolidation Loan       |
| DO               | Defaulted, Then Bankrupt, Active, Other                  |
| DP               | Defaulted, Paid in Full                                  |
| DR               | Defaulted Loan in Roll-Up Loan                           |
| DS               | Defaulted, Then Disabled                                 |
| DT               | Defaulted, Collection Terminated                         |
| DU               | Defaulted, Unresolved                                    |
| DW               | Defaulted, Write-off                                     |
| DX               | Defaulted, Six Consecutive Payments                      |
| DZ               | Defaulted, Six Consecutive Payments, Then Missed Payment |
| FB               | Forbearance  |

| Loan Status Code | Definition  |
|------------------|---|
| FC               | False Certification Discharge   |
| IA               | Loan Originated   |
| ID               | In School or Grace Period   |
| IG               | In Grace Period   |
| IM               | In Military Grace   |
| IP               | In Post-Deferment Grace (Perkins Only)  |
| OD               | Defaulted, Then Bankrupt, Discharged, Other   |
| PC               | Paid in Full Through Consolidation Loan   |
| PF               | Paid in Full  |
| PM               | Presumed Paid in Full   |
| PN               | Non-Defaulted, Paid in Full Through Consolidation Loan  |
| RF               | Refinanced  |
| RP               | In Repayment  |
| UA               | Temporarily Uninsured - No Default Claim Requested  |
| UB               | Temporarily Uninsured - Default Claim Denied  |
| UC               | FFEL = Permanently Uninsured/Unreinsured - No Default Claim Requested   |
| UD               | FFEL = Permanently Uninsured/Unreinsured - Default Claim Denied<br><br>Perkins = Defaulted Loan Purchased by School - Unreinsured |
| UI               | Uninsured/Unreinsured   |
| XD               | Defaulted, Six Consecutive Payments   |

The Guaranty Agency/Lender/Servicer Agent History table displays a history of the holders of the loan:

- **Start:**
  - **Guaranty Agency**—The date the agency started overseeing the loan.
  - **Lender**—The date the lender started holding the loan.
  - **Servicer Agent**—The date the agent started servicing the loan.
- **End:**
  - **Guaranty Agency**—The date the agency stopped overseeing the loan. The value of Current indicates the agency is overseeing the loan now.

- **Lender**—The date the lender stopped holding the loan. The value of Current indicates the lender is holding the loan now.
- **Servicer Agent**—The date the servicing agent stopped servicing the loan. The value of Current indicates the agent is servicing the loan now.
- **Code**—An ED-assigned number for each GA, Lender, or Servicer Agent for the specified loan.
- **Name**—The name of the GA, Lender, or Servicer Agent for the specified loan. Click the name of the Guaranty Agency, Lender, or Servicer Agent to link to its Organization Contact list.

**Notes:**

- PLUS Loan information may appear at the top of this page below the Identifier information. It displays either the PLUS borrower's or the student's Name, SSN, and DOB (i.e., you can view information on this loan by either typing the PLUS borrower's SSN or by typing the child's SSN when accessing Loan History).
- A PLUS Loan is a loan where the borrower is a parent who borrows on behalf of a student. Any PLUS loans appear on the student's Loan History. They are not added into the student's aggregate amounts, nor does a default status on any PLUS loans prevent a student from borrowing for himself or herself.



## 3.4.2 Overpayment History

The Overpayment History page (Figure 3-15) displays the overpayments reported to the NSLDS for a student. If the overpayment is from your school and you have proper access, you can use this page to create a new overpayment or change the status of an existing overpayment. The Overpayment History page summarizes past and present Perkins loan, Supplemental Educational Opportunity Grant (SEOG), and Pell grant overpayments for students. Overpayments are sorted in ascending order by school code, school branch code, overpayment source, overpayment disbursement date, and overpayment aid type.

The Overpayment History table displays the following information, if applicable:


- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. Three types are maintained in the NSLDS:
  - **FEDERAL PELL GRANT**—A Federal grant award to help undergraduates pay for their education after high school.
  - **PERKINS LOAN**—These Federal loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT**—A campus-based grant program for undergraduate students of exceptional financial need who have not completed their first baccalaureate degree.
- **Ind** (Indicator)—One of three identifiers that indicate the status of the overpayment:
  - **OVERPAYMENT**—This is the value that a school uses when first entering an active overpayment into the system. It means that the student owes the overpayment, has not made satisfactory arrangements to repay, and should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.
  - **SATISFACTORY ARRANGEMENT MADE**—This value means that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status, when reported to other schools on SARs or ISIRs (or in the FAT batch process of the NSLDS), will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the overpayment indicator box to Overpayment. A status of Satisfactory Arrangement Made will not produce the overpayment flags and messages on SARs and ISIRs.
  - **REPAID**—This value means that a previously reported overpayment that was in either an active Overpayment or Satisfactory Arrangement Made Overpayment status

has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A REPAID status will not produce the overpayment flags and messages on SARs and ISIRs.

- **Disbursement Date**—Date the award was made.
- **Repayment Date**—Date the overpayment was satisfied.
- **Create Date**—Date the overpayment was entered into the NSLDS. This box is automatically updated with the system date.
- **Source**—Identifies where the overpayment exists:
  - **School**—Whenever a school is attempting to add a new or update an existing overpayment record, this field is automatically updated with the School.
  - **Transfer (TRF)**—When a school has transferred an overpayment to the Department of Education’s Debt Collection Service (DCS), the school should update the previously reported overpayment information in the NSLDS by changing the Source from School to Transfer. This change will not invalidate the overpayment, but it will inform any user of the system that the debt is in the process of being transferred from the school to DCS.
  - **EDR (ED Region)**—The debt is now held by one of the U.S. Department of Education’s Debt Collection Service regional offices.
- **Updated**—The date the overpayment was last updated and the person performing the update is shown under the Source. This information is automatically updated by the system.

The following options are available:

- To add an Overpayment, click Add Overpayment.
- To view the Overpayment Display, click the highlighted number icon under the Type column.
- To view the Organization Contact List, click the school name.




[Menu](#) [Aid](#) [Org](#) [Report](#) [Tran](#)



[Loan History](#) | [Overpayment History](#) | [Pell Grant](#) | [Enrollment History](#) | [Enrollment Update](#)

SSN:  First Name:  DOB:  (MMDDCCYY)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TALLADEGA COLLEGE](#)

 TARA MARIE M NUNEZ  
SSN: 043.90.6703 DOB: 02/16/1975

**Overpayment History List**

| Type   | Ind    | Disbursement Date | Repayment Date | Create Date | Source  |
|--|--------|-------------------|----------------|-------------|---|
|  FEDERAL PELL GRANT | REPAID | 11/30/1998        | 01/15/2000     | 07/17/2000  | School  |
| <a href="#">MICHIGAN STATE UNIVERSITY 00229000</a>   |        |                   |                |             | Updated: 07/17/2000 by DUMMY SCHOOL  |


 [PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-15, Overpayment History

### 3.4.2.1 Overpayment Add

The Overpayment Add page (Figure 3-16) allows you to enter information about students who owe an overpayment on a Title IV grant or a Perkins loan. Overpayment data reported by schools is added to the NSLDS and then transferred to the Central Processing System for inclusion on SARs and ISIRs.

To add overpayment information:

1. In the **Type** box, click an option from the list. (See list of definitions below.)
2. In the **Disbursement Date** box, type the date.
3. In the **Indicator** box, click an option from the list. (See list of definitions below.)
4. In the **Repayment Date** box, type the date, if applicable.
5. In the **Source** box, click an option from the list. (See list of definitions below.)
6. In the **Region Code** box, click an option from the list.
7. Click **Submit**.

**Note:**

Org Search allows you to search and select a school OPEID. Click Org Search and select a school OPEID by clicking the numbered bullet next to the school. Your selection will appear in the school OPEID box.

The Overpayment Add page displays the following information:

- **School**—The name of the school and a link to the **Organization Contact List** page. To view the school name and OPEID code, hold your mouse over the “cross” icon.
- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. The following Types are maintained in the NSLDS:
  - **FEDERAL PELL GRANT**—A Federal grant award. These grants help undergraduates pay for their education.
  - **PERKINS LOAN**—Federal Perkins Loans. These loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT**—Federal Supplemental Education Opportunity Grant. A campus-based grant program based on financial need for undergraduate students who have not completed their first baccalaureate degree.

- **Disbursement Date**—The date for the beginning of a payment period in which the aid was disbursed. It is important to note that the Disbursement Date the school uses must be the same date that the school used on the letters and forms assigning the obligation to the Debt Collection Service.
- **Indicator**—One of three codes identifying the status of the overpayment:
  - **OVERPAYMENT**—A school uses this indicator when first entering an active overpayment into the system. It means that the student owes the overpayment and has not made a satisfactory arrangement to repay. Therefore, the student should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.

**Note:**

When OVERPAYMENT is selected and submitted, the Ind box on the Overpayment History page will display OVERPAYMENT in red shading.

- **SATISFACTORY ARRANGEMENT MADE**—This indicator means that although the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. A status of S reported to other schools on SARs or ISIRs (or in the FAT batch process of the NSLDS) will provide documentation that the student may continue to receive Title IV aid. If the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the indicator to OVERPAYMENT.

**Note:**

When SATISFACTORY ARRANGEMENT MADE is selected and submitted, the Ind box on the Overpayment History page will display SATISFACTORY ARRANGEMENT MADE.

- **REPAID**—This indicator means that a previously reported overpayment in an active OVERPAYMENT or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A REPAID status will not produce the overpayment flags and messages on SARs and ISIRs.

**Note:**

When REPAID is selected and submitted, the Ind box on the Overpayment History page will display REPAID.

- **Repayment Date**—The date the overpayment was paid in full.
- **Source**—One of three codes identifying where the overpayment exists:

- **EDR - ED Region**—The debt is now held by one of the U.S. Department of Education’s Debt Collection Service regional offices. This will also show the number assigned to the region currently holding the debt.
- **TRF - Transfer**—When a school has transferred an overpayment to the Debt Collection Service, the school should update the previously reported overpayment information in the NSLDS by changing the Source from SCH to TRF. This change will not invalidate the overpayment, but it will indicate that the debt is in the process of being transferred from the school to the Debt Collection Service.
- **SCH - School**—Whenever a school is attempting to add a new or update an existing overpayment record, this box is automatically updated with the School.

NSLDS

Menu Aid Org Report Tran

Loan History | Overpayment History | Pell Grant | Enrollment History | Enrollment Update

Logged on as: DUMMY SCHOOL ID FOR TRAINING from RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE

Return To Overpayment History List

JEANNINE A MARULLO  
SSN: 043-78-2588 DOB: 01/08/1955

Overpayment Add

School: RUTGERS THE STATE UNIVERSITY OF NEW JERS +

Type: - SELECT -

Disbursement Date: MMDDCCYY

Indicator: - SELECT -

Repayment Date: MMDDCCYY

Source: - SELECT -

Submit

PRIVACY ACT OF 1974 (AS AMENDED)

Figure 3-16, Overpayment Add

### 3.4.2.2 Overpayment Add and Student Add

The Overpayment Add and Student Add page (Figure 3-17) allows you to enter student identifier and overpayment information for a student who owes an overpayment on a Title IV grant or a Perkins loan. Overpayment data reported by schools are added to the NSLDS and then transferred to the Central Processing System for inclusion on SARs and ISIRs.

To add Student Details and Overpayment Details:

1. In the **First Name** box, type student's first name.
2. In the **Middle Initial** box, type student's middle initial.
3. In the **Last Name** box, type student's last name.
4. In the **Date of Birth** box, type student's date of birth.
5. In the **Type** box, click an option from the list. (See list of definitions below.)
6. In the **Disbursement Date** box, type the date.
7. In the **Indicator** box, click an option from the list. (See list of definitions below.)
8. In the **Repayment Date** box, type the date, if applicable.
9. In the **Source** box, click an option from the list. (See list of definitions below.)
10. Click **Submit**.

**Notes:**

- The Social Security Number will automatically appear because the student's SSN was typed in previously.
- The school name and OPEID will automatically appear if you represent a school.
- Org Search allows you to search and select a School OPEID. Click Org Search and select a school OPEID by clicking the numbered bullet next to the school. Your selection will appear in the school OPEID box.

The text boxes in Overpayment Details are defined as follows:

- **School**— The name of the school and a link to the **Organization Contact List** page. To view the school name and OPEID code, hold your mouse over the “cross” icon.
- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. The following Types are maintained in the NSLDS:
  - **FEDERAL PELL GRANT**—A Federal grant award. These grants help undergraduates pay for their education.

- **PERKINS LOAN**—Federal Perkins Loans. These loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
- **SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT**—Federal Supplemental Education Opportunity Grant. A campus-based grant program based on financial need for undergraduate students who have not completed their first baccalaureate degree.
- **Disbursement Date**—The date for the beginning of a payment period in which the aid was disbursed. It is important to note that the Disbursement Date the school uses must be the same date that the school used on the letters and forms assigning the obligation to the Debt Collection Service.
- **Indicator**—One of three codes identifying the status of the overpayment:
  - **OVERPAYMENT**—A school uses this indicator when first entering an active overpayment into the system. It means that the student owes the overpayment and has not made a satisfactory arrangement to repay. Therefore, the student should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.

**Note:**

When OVERPAYMENT is selected and submitted, the Ind box on the Overpayment History page will display OVERPAYMENT in red shading.

- **SATISFACTORY ARRANGEMENT MADE**—This indicator means that although the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. A status of S reported to other schools on SARs or ISIRs (or in the FAT batch process of the NSLDS) will provide documentation that the student may continue to receive Title IV aid. If the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the indicator to OVERPAYMENT.

**Note:**

When SATISFACTORY ARRANGEMENT MADE is selected and submitted, the Ind box on the Overpayment History page will display SATISFACTORY ARRANGEMENT MADE.


- **REPAID**—This indicator means that a previously reported overpayment in an active OVERPAYMENT or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time.



**Note:**

When REPAID is selected and submitted, the **Ind** box on the **Overpayment History** page will display REPAID.

- **Repayment Date**—The date the overpayment was paid in full.
- **Source**—One of three codes identifying where the overpayment exists:
  - **EDR - ED Region**—The debt is now held by one of the U.S. Department of Education’s Debt Collection Service regional offices. This will also show the number assigned to the region currently holding the debt.
  - **TRF - Transfer**—When a school has transferred an overpayment to the Debt Collection Service, the school should update the previously reported overpayment information in the NSLDS by changing the Source from SCH to TRF. This change will not invalidate the overpayment, but it will indicate that the debt is in the process of being transferred from the school to the Debt Collection Service.
  - **SCH - School**—Whenever a school is attempting to add a new or update an existing overpayment record, this box is automatically updated with the School.




Menu
Aid
Org
Report
Tran

[S](#) | [?](#) | [X](#)


[Loan History](#) | [Overpayment History](#) | [Pell Grant](#) | [Enrollment History](#) | [Enrollment Update](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [IOWA STATE UNIVERSITY OF SCIENCE & TECHNOLOGY](#)



Return To  
Overpayment History List

No student currently selected.



### Overpayment Add

#### New Student Details

Social Security Number: 043-89-0123

First Name:

Middle Initial:

Last Name:

Date Of Birth:  MMDDCCYY

#### Overpayment Details

School: [IOWA STATE UNIVERSITY OF SCIENCE & TECHN](#) +

Type:

Disbursement Date:  MMDDCCYY

Indicator:

Repayment Date:  MMDDCCYY

Source:



[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-17, Overpayment Add and Student Add

### 3.4.2.3 Overpayment Display

The Overpayment Display page (Figure 3-18) displays an overpayment listed on the Overpayment History page, which can be updated or deleted.


To update an overpayment, click **Update**.

To delete an overpayment, click **Delete**.




The Overpayment Display table displays the following information, if applicable:

- **School**—The school the student was attending when the overpayment occurred.
- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. The following types are maintained in the NSLDS:
  - **FEDERAL PELL GRANT**—A Federal grant award to help undergraduates pay for their education after high school.
  - **PERKINS LOAN**—These Federal loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT**—A campus-based grant program for undergraduate students of exceptional financial need who have not completed their first baccalaureate degree.
- **Disbursement Date**—The date the student was issued the aid.
- **Indicator**—The codes that identify the status of the overpayment:
  - **OVERPAYMENT**—This is the value that a school uses when first entering an active overpayment into the system. It means that the student owes the overpayment, has not made satisfactory arrangements to repay, and should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.
  - **SATISFACTORY ARRANGEMENT MADE**—This value means that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status reported to other schools on SARs or ISIRs (or in the FAT batch process of the NSLDS) will provide documentation that the student may continue to receive Title IV aid. If the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the overpayment indicator to Overpayment.

- **REPAID**—This value means that a previously reported overpayment has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A REPAID status will not produce the overpayment flags and messages on SARs and ISIRs.
- **Repayment Date**—Date the overpayment was satisfied.
- **Source**—The codes that identify where the overpayment exists:
  - **School**—The school currently holds the Overpayment.
  - **Transfer**—When a school has transferred an overpayment to the Department of Education’s Debt Collection Service (DCS), the school will update the previously reported overpayment information in the NSLDS by changing the Source field from School to Transfer. This change does not invalidate the overpayment, but it does mean that the debt is in the process of being transferred from the school to DCS.
  - **EDR (ED Region)**—The debt is now held by one of the U.S. Department of Education’s Debt Collection Service regional offices.
- **Region Code**—If the debt is now held by the Department of Education’s Debt Collection Service, this code indicates which office holds the debt.




[Menu](#) [Aid](#) [Org](#) [Report](#) [Tran](#)


  

[Loan History](#) | [Overpayment History](#) | [Pell Grant](#) | [Enrollment History](#) | [Enrollment Update](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE](#)

 Return To  
Overpayment History List

TANYA J LANGLAIS  
SSN: 043.90.5190      DOB: 01/15/1973



**Overpayment Display**

Update

Delete

School: [RUTGERS THE STATE UNIVERSITY OF NEW JERS.](#) +  
Type: PERKINS LOAN  
Disbursement Date: 06/06/2001  
Indicator: OVERPAYMENT  
Repayment Date: N/A  
Source: School


 [PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-18, Overpayment Display

### 3.4.2.3.1 Overpayment Update

The Overpayment Update page (Figure 3-19) plays student's overpayment records with the supporting details. From this page, you can update the overpayment status (Indicator), the repayment date, the source of overpayment, and the region.

To update an overpayment:

1. In the **Indicator** box, click an overpayment status from the list. (See list of definitions below.)
2. In the **Repayment Date** box, type the date the overpayment was repaid.
3. In the **Source** box, click a source from the list. (See list of definitions below.)
4. In the **Region Code** box, click a region code from the list. (Only applicable to ED users.)
5. Click **Submit**.

The Indicator is one of three options identifying the status of the overpayment:

- **OVERPAYMENT**—This is the value that a school uses when first entering an active overpayment into the system. It means that the student owes the overpayment, has not made satisfactory arrangements to repay, and should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.
- **SATISFACTORY ARRANGEMENT MADE**—This means that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. A status of SATISFACTORY ARRANGEMENT MADE reported to other schools on SARs or ISIRs (or in the FAT batch process of the NSLDS) will provide documentation that the student may continue to receive Title IV aid. If the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the indicator to OVERPAYMENT. A status of SATISFACTORY ARRANGEMENT MADE will not produce the Overpayment flags and messages on SARs and ISIRs.
- **REPAID**—This value means that a previously reported overpayment that was either in an active OVERPAYMENT or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A REPAID status will not produce the overpayment flags and messages on SARs and ISIRs.

The **Source** is one of three options identifying where the overpayment exists:

- **SCH - School**—The school currently holds the Overpayment.

- **TRF - Transfer**—When a school has transferred an overpayment to the Department of Education’s Debt Collection Service, the school should update the previously reported overpayment information in the NSLDS by changing the Source field from SCH to TRF. This change will not invalidate the overpayment, but it will inform any user of the system that the debt is in the process of being transferred from the school to the Debt Collection System.
- **EDR**—ED Region. The debt is now held by one of the U.S. Department of Education’s Debt Collection Service regional offices. This code may display based on the type of user.

**Note:**

If this option displays, the Region Code will have to be updated.

The Region Code is the numerical code of a Department of Education region.

**Note:**

The reporting of Title IV overpayment information to the NSLDS is separate and distinct from the reporting of some overpayments to the Department of Education that enables the Debt Collection Service (DCS) to collect the overpayment.

The screenshot shows the NSLDS (National Student Loan Data System) interface. At the top, there's a navigation bar with links: Menu, Aid, Org, Report, Tran. Below this is a purple banner with links: Loan History, Overpayment History, Pell Grant, Enrollment History, Enrollment Update. A status bar indicates the user is logged on as 'DUMMY SCHOOL ID FOR TRAINING' from 'RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE'.

On the left, there's a 'Return To Overpayment Display' link. The main content area is titled 'Overpayment Update' with a question mark icon. It contains a form with the following fields:

- School: RUTGERS THE STATE UNIVERSITY OF NEW JERS +
- Type: FEDERAL PELL GRANT
- Disbursement Date: 09/03/1999
- Indicator: OVERPAYMENT (dropdown menu)
- Repayment Date: (text input field) MMDDCCYY
- Source: TRF - TRANSFER (dropdown menu)

A 'Submit' button is located below the form. At the bottom of the page, there's a purple banner with the text 'PRIVACY ACT OF 1974 (AS AMENDED)'.

Figure 3-19, Overpayment Update

### 3.4.2.3.2 Overpayment Delete Confirmation

The Overpayment Delete Confirmation page (Figure 3-20) allows you to delete an overpayment when the overpayment has been entered in error. Be sure to read the confirmation statement and review the overpayment information displayed below the confirmation statement. To delete, click **Confirm**.

The screenshot displays the NSLDS (National Student Loan Data System) interface. At the top, there is a navigation bar with the NSLDS logo and tabs for Menu, Aid, Org, Report, and Tran. Below this is a purple header bar containing links for Loan History, Overpayment History, Pell Grant, Enrollment History, and Enrollment Update. A status bar indicates the user is logged on as 'DUMMY SCHOOL ID FOR TRAINING from RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE'.

On the left, there is a 'Return To Overpayment Display' link with a back arrow icon. The main content area is titled 'Overpayment Delete Confirmation' with a question mark icon. Below the title is a confirmation message: 'You have requested the following overpayment be deleted from the system. Overpayments should only be deleted when entered in error. Overpayments should not be deleted if the overpayment is repaid. If this is the last overpayment for this borrower and this borrower has no other aid, the borrower information and the overpayment will be deleted. Click CONFIRM to complete the delete.'

Below the message is a box containing the following information:

- School: [RUTGERS THE STATE UNIVERSITY OF NEW JERS](#) +
- Type: FEDERAL PELL GRANT
- Disbursement Date: 09/03/1999
- Indicator: OVERPAYMENT
- Repayment Date: N/A
- Source: Transfer

At the bottom of this box is a 'Confirm' button. The footer of the page is a purple bar with a home icon and the text 'PRIVACY ACT OF 1974 (AS AMENDED)'.

Figure 3-20, Overpayment Delete Confirmation



### 3.4.3 Pell Grant History

The Pell Grant History page (Figure 3-21) is accessed from the Menu page or any Financial Aid pages. This page allows you to view Pell grants that a student has been awarded. The Pell Grant icon displays on the Loan History page if at least one Pell Grant exists with an amount greater than zero. The grants display in chronologically descending order.

The Pell Grant History table displays the following:

- **Award Year**—The school year in which the student received a Pell Grant, as reported by the reporting campus.
- **Scheduled Amount**—The scheduled amount of the Pell Grant award.
- **Award Amount**—The amount of the Pell Grant the school expects to pay the student based on the student's enrollment and school's cost of attendance.
- **Disbursed Amount**—The amount of the Pell Grant the school has disbursed to the student.
- **Remaining Amount**—The amount of the Pell Grant the school still expects to give the student for the remainder of the award year.
- **% Scheduled Used**—The percent of eligibility the student has used.
- **As of Date**—Latest date the Federal Pell Grant Program processed the payment record.

**Note:**

Beginning with the school year 1999/2000, this box is the date a disbursement is made to the student.

- **Tran**—The transaction number on the SAR or ISIR for the payment accepted by the school.
- **School and OPEID**—The school's name and their Department of Education eight-digit identification code. From this field, you can link to the **Organization Contact List** page.
- **EFC (Expected Family Contribution)**—The index produced by the Congressional Methodology (CM) program that assesses an applicant's financial needs.

- **Ver. Flag**—The result of verification by school. The flag values are defined as follows:

| Flag | Value   |
|------|---|
| N    | Not Selected by CPS (Central Processing System) |
| A    | Accurate  |
| W    | Without documentation                           |
| T    | Tolerance                                       |
| C    | Calculated                                      |
| R    | Reprocessed                                     |
| S    | Selected, not verified                          |

**NSLDS** Menu Aid Org Report Tran

Loan History | Overpayment History | **Pell Grant** | Enrollment History | Enrollment Update

SSN:  First Name:  DOB:  (MMDDCCYY) Retrieve

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE](#)

JEANNINE A MARULLO  
SSN: 043-78-2588 DOB: 01/08/1955

**i** Student is on your school's Transfer Monitoring List.

Student Monitoring Detail

**? Pell Grant History**

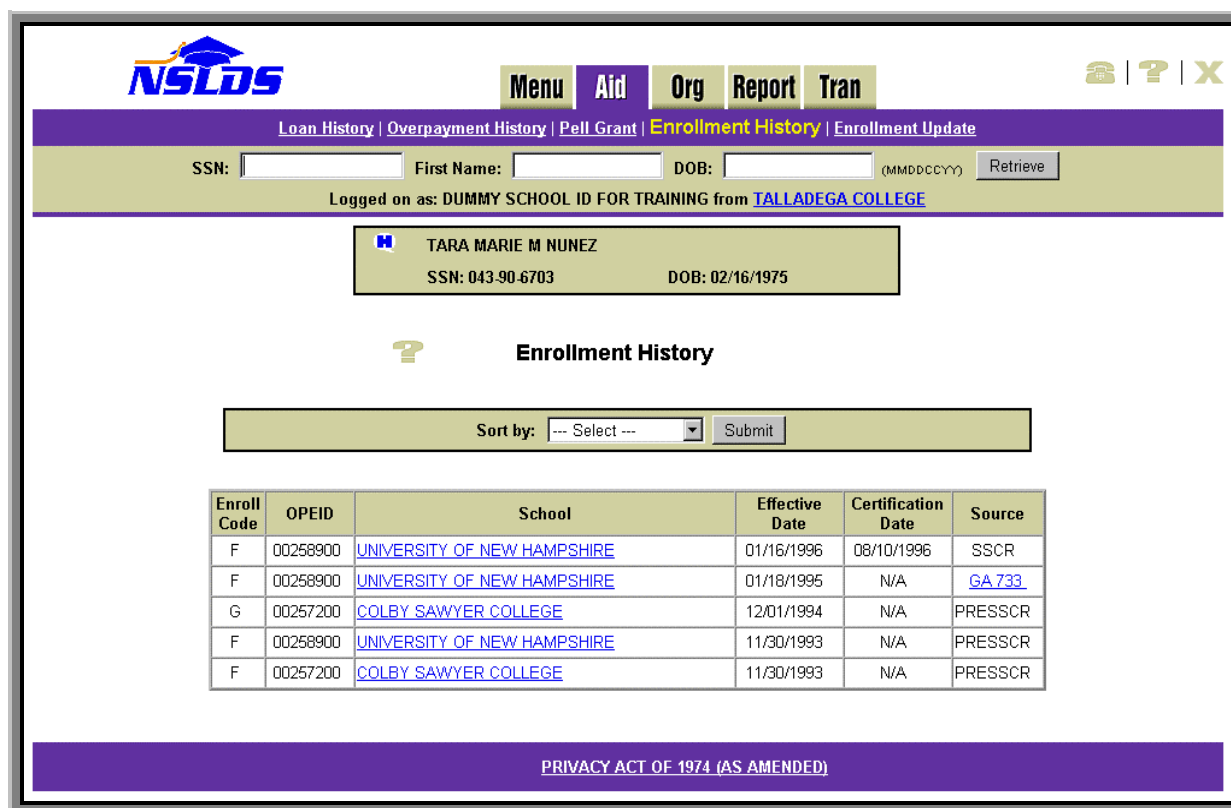
| Award Year  | Scheduled Amount | Award Amount | Disbursed Amount                                       | Remaining Amount | % Scheduled Used | As of Date   | Tran |
|-------------|------------------|--------------|--|------------------|------------------|--------------|------|
| 1995 - 1996 | \$690            | N/A          | \$259  | \$0              | 37.54            | 03/19/1996   | 04   |
|             |                  |              | <a href="#">UNIVERSITY OF MAINE - MACHIAS 00205500</a> |                  | EFC: 1638        | Ver. Flag: R |      |
| 1994 - 1995 | \$1,350          | N/A          | \$675  | \$0              | 50.00            | 12/23/1994   | 06   |
|             |                  |              | <a href="#">UNIVERSITY OF MAINE - AUGUSTA 00676000</a> |                  | EFC: 979         | Ver. Flag: R |      |
| 1993 - 1994 | \$1,750          | N/A          | \$437  | \$438            | 50.00            | 12/14/1993   | 01   |
|             |                  |              | <a href="#">UNIVERSITY OF MAINE - MACHIAS 00205500</a> |                  | EFC: 572         | Ver. Flag: A |      |

[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-21, Pell Grant History

### 3.4.4 Enrollment History

The Enrollment History page (Figure 3-22) presents information about a student's past and present enrollment status while receiving either a loan or a deferment for a loan. The information consists of the enrollment code, OPEID, names of schools attended, the effective dates, the certification dates, the information source, and an anticipated completion date.



**NSLDS** Menu Aid Org Report Tran

Loan History | Overpayment History | Pell Grant | **Enrollment History** | Enrollment Update

SSN:  First Name:  DOB:  (MMDDCCYY)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TALLADEGA COLLEGE](#)

**TARA MARIE M NUNEZ**  
SSN: 043-90-6703 DOB: 02/16/1975

**Enrollment History**

Sort by:

| Enroll Code | OPEID    | School                                      | Effective Date | Certification Date | Source                 |
|-------------|----------|---|----------------|--------------------|------------------------|
| F           | 00258900 | <a href="#">UNIVERSITY OF NEW HAMPSHIRE</a> | 01/16/1996     | 08/10/1996         | SSCR                   |
| F           | 00258900 | <a href="#">UNIVERSITY OF NEW HAMPSHIRE</a> | 01/18/1995     | N/A                | <a href="#">GA 733</a> |
| G           | 00257200 | <a href="#">COLBY SAWYER COLLEGE</a>        | 12/01/1994     | N/A                | PRESSCR                |
| F           | 00258900 | <a href="#">UNIVERSITY OF NEW HAMPSHIRE</a> | 11/30/1993     | N/A                | PRESSCR                |
| F           | 00257200 | <a href="#">COLBY SAWYER COLLEGE</a>        | 11/30/1993     | N/A                | PRESSCR                |

[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-22, Enrollment History

### 3.4.5 Enrollment Update

The Enrollment Update page (Figure 3-23) allows you to update a student's enrollment status and displays the following:

- **Enrollment Code**—An alpha character that represents a student's current and past enrollment status. The enrollment codes are defined as follows:

| Code | Status                                     |
|------|--|
| A    | Approved leave of absence                  |
| D    | Deceased                                   |
| F    | Full time                                  |
| G    | Graduated                                  |
| H    | Half time or more, but less than full time |
| L    | Less than half time                        |
| W    | Withdrawn                                  |
| X    | Never attended                             |
| Z    | No record found                            |

- **Enrollment Code Effective Date**—The first date the enrollment status became effective, with no interruptions.
- **Enrollment Code Certification Date**—The date the school processes the SSCR roster file.
- **Anticipated Completion Date**—The date when a student is scheduled to complete course requirements.
- **Student Designator (optional)**—The student identifier used by a school when the law does not require an SSN.

A student's enrollment may be updated by completing the Enrollment Update table, which is located below the Enrollment History table.

To update an enrollment:

1. In the **Enrollment Code** box, click an option from the list.
2. Type the **Enrollment Code Effective Date**.
3. Type the **Enrollment Code Certification Date**.
4. Type the **Anticipated Completion Date**.
5. Type the **Student Designator (optional)**.
6. Click **Submit**.

**Note:**

The Student Designator is optional.

After entering information in the required text boxes, click Submit. The Enrollment History page automatically redisplays with the newly submitted information.

The screenshot shows the NSLDS (National Student Loan Data System) web interface. At the top, there is a navigation bar with the NSLDS logo and tabs for Menu, Aid, Org, Report, and Tran. Below this is a purple banner with links: Loan History, Overpayment History, Pell Grant, Enrollment History, and Enrollment Update (highlighted). The main content area has a header with fields for SSN, First Name, and DOB, each with a text input box and a (MMDDCCYY) format hint. A Retrieve button is to the right. Below this, it says "Logged on as: DUMMY SCHOOL ID FOR TRAINING from TALLADEGA COLLEGE". A box displays the user's information: TARA MARIE M NUNEZ, SSN: 043-90-6703, and DOB: 02/16/1975. The main section is titled "Enrollment Update" and includes "SSCR History at: TALLADEGA COLLEGE 00104600". The form contains several fields: Enrollment Code (a dropdown menu set to "-- Select --"), Enrollment Code Effective Date (text input with (MMDDCCYY) hint), Enrollment Code Certification Date (text input with 07/24/2001 and (MMDDCCYY) hint), Anticipated Completion Date (text input with (MMDDCCYY) hint), and Student Designator (optional) (text input). A Submit button is at the bottom of the form. A footer bar contains a home icon and the text "PRIVACY ACT OF 1974 (AS AMENDED)".

Figure 3-23, Enrollment Update

### 3.4.6 Student Access Interface

The Student Access Interface page (Figure 3-24) links the NSLDS Financial Aid Professional (NSLDSFAP) Web site to the NSLDS Student Access Web site. This interface allows you to view the borrower's financial aid records as the borrower would view them.

To link to the NSLDS Student Access Web site:

1. Type the **SSN**, **Last Name** (first 2 characters), and **DOB**.
2. Click **Link**.
3. To return to the NSLDSFAP Web site, click **Back to FAP** at the bottom of the Financial Aid Review page.

The screenshot shows the NSLDS Student Access Interface. At the top is the NSLDS logo. To the right are navigation tabs: Menu, Aid, Org, Report, and Tran. Further right are icons for a phone, help (?), and exit (X). Below these is a purple navigation bar with links: Loan History, Overpayment History, Pell Grant, Enrollment History, Enrollment Update, and Student Access Interface. The main form area has a header with input fields for SSN (999999999), First Name, and DOB (MMDDCCYY), followed by a Retrieve button. Below this, it says 'Logged on as: SANDRA D PLEGER from Department of Education Region 0'. A box displays the borrower's information: ERIK J HALL, SSN: 333-33-3333, and DOB: 11/10/1974. The title 'Student Access Interface' is centered. Below it is another form with input fields for SSN (333-33-3333), Last Name (HA, with a note '(First 2 characters)'), and DOB (11/10/1974, with a note '(MMDDCCYY)'). A Link button is positioned below this form.

Figure 3-24, Student Access Interface

## 3.5 Organization

The Organization pages allow you to link to information about organizations in the Title IV programs.

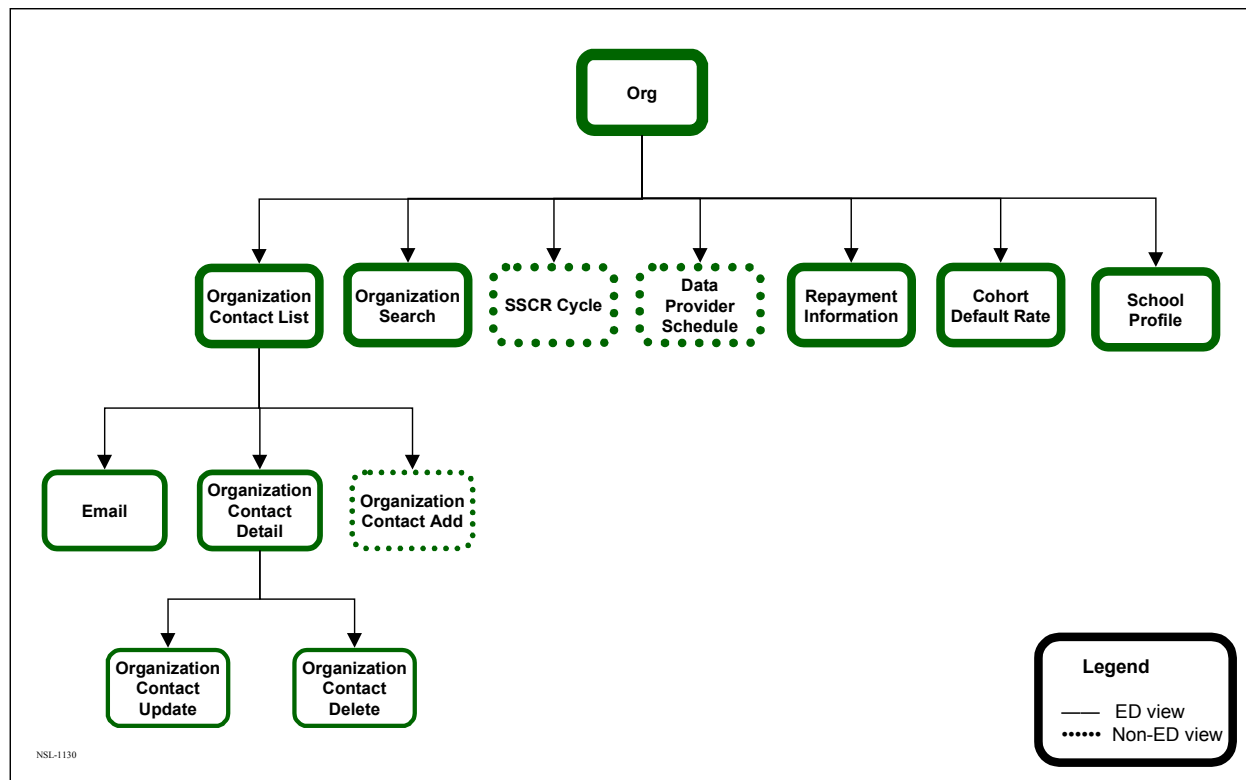


Figure 3-25, Organization Diagram

### 3.5.1 Organization Contact List

The Organization Contact List page (Figure 3-26) displays the organization and summary contact information for the NSLDS functions. The Organization Contact List page is the entry point for all links to the organization's function names. Each organization may add new names to its own organization contacts list in the NSLDS by linking to the Organization Contact Add page using the Add New Contact button on this Web page.

The Organization Search Bar is located directly below the Navigation Bar. The Type, Code, and Name boxes appear here. When an organization is retrieved or selected, the organization identifier information will appear at the top of each organization page.

To search for an organization:

1. Select the **Type** of organization you want to search for by clicking the down-arrow.
2. Type the **Code** or **Name** of the organization.
3. Click **Retrieve**.

**Notes:**


- The search results will match or closely match the information you selected or typed in the boxes. Click the numbered bullet next to the Name to view more information.
- The Code or Name can be typed partially in the respective text boxes in order to retrieve search results (i.e., you can type 'J', rather than 'John Doe University', in the Name box).
- If the organization you are searching for does not appear on the list, alter the punctuation and spelling. You must type the name exactly as it appears in the NSLDS. For example, if you are searching for California State University in Sacramento, it must be typed 'California State University-Sacramento'. If you type 'California State University, Sacramento', it will not appear on the list.

Under Function, click the numbered bullet to view more information about this contact. Under Email, click the envelope icon to send e-mail to this contact. It will use your computer's default e-mail package. If you are authorized to add a new contact for this organization, click Add New Contact. If you are authorized to update or delete a contact for this organization, click the number of the contact to access the Organization Contact Detail page.

**Notes:**

- No list will be displayed when no contacts have been entered on the NSLDS.
- The Privacy Act does not apply to any of the Organization pages and does not display.





MenuAidOrgReportTran

Org Contact List | Org Search | SSCR Cycle | Data Provider Schedule | Repayment Information

Type: --- Select ---Code: Name: Retrieve

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TALLADEGA COLLEGE](#)

**Name:** TALLADEGA COLLEGE  
**Code:** 00104600 **Type:** School  
**Status:** ERROR  
**Address:** 627 WEST BATTLE STREET  
TALLADEGA, AL 35160

**Organization Contact List**

Add New Contact


| Function                 | First Name / Last Name | Phone / Ext.  | Email   |
|--------------------------|------------------------|---------------|---|
| <b>1</b> PRIMARY CONTACT | OLIVER<br>TWIST        | (970)657-1997 |  |

Figure 3-26, Organization Contact List

### 3.5.1.1 Organization Contact Detail

The Organization Contact Detail page (Figure 3-27) displays organization contact information that can be updated or deleted. This page displays details for one contact person.

To update contact information:


1. Select or type updated information in the text boxes.
2. Click **Submit**.

**Notes:**

- Under Functions, you may select multiple functions by holding down the SHIFT key or CTRL key and clicking your selections.
- One person in an organization can be assigned multiple functions, but a function can only be assigned to one person in an organization.
- The name of the person who last updated the organization contact information and the date will be displayed on the Organization Contact Detail page.

To delete a contact:


1. Read the confirmation statement.
2. Review the contact information displayed below the confirmation statement.
3. To delete the contact, click **Confirm**.



MenuAidOrgReportTran

Org Contact List | Org Search | SSCR Cycle | Data Provider Schedule | Repayment Information

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TALLADEGA COLLEGE](#)

  
Return To Organization  
Contact List

**Name:** TALLADEGA COLLEGE  
**Code:** 00104600 **Type:** School  
**Status:** ERROR  
**Address:** 627 WEST BATTLE STREET  
TALLADEGA, AL 35160

**Organization Contact Detail**

UpdateDelete

**Function:** PRIMARY CONTACT  
**First Name:** OLIVER  
**Last Name:** TWIST  
**Title:** STUDENT LOAN OFFICER  
**Phone:** (970)657-1997  
**Fax:** (970)657-1998  
**E-Mail:** [more@tcoll.edu](mailto:more@tcoll.edu)  
**URL:**  
**Address:** 1974 BIRMINGHAM DR.  
  
**City:** LONDON  
**State:** AL  
**Zip Code:** 35160  
**Last Update By:** DUMMY SCHOOL ID FOR TRAINING  
**Update Date:** 07/17/2000

Figure 3-27, Organization Contact Detail

### 3.5.1.1.1 Organization Contact Update


The Organization Contact Update page (Figure 3-28) allows you, if you are authorized, to update organization contact information for your organization. The Organization Contact Update page displays the contact information for a selected function and allows you to update this information.

To update contact information:

1. Select or type updated information in the text boxes.
2. Click **Submit**.

**Notes:**


- Under Functions, you may select multiple functions by holding down the SHIFT key or CTRL key and clicking your selections.
- One person in an organization can be assigned multiple functions, but a function can only be assigned to one person in an organization.
- The name of the person who last updated the organization contact information and the date will be displayed on the Organization Contact Detail page.



[Menu](#) [Aid](#) [Org](#) [Report](#) [Tran](#)

[Org Contact List](#) | [Org Search](#) | [SSCR Cycle](#) | [Data Provider Schedule](#) | [Repayment Information](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE](#)



**Name:** RUTGERS THE STATE UNIVERSITY OF NEW JERSEY  
CENTRAL OFFICE  
**Code:** 00262900 **Type:** School  
**Status:** ERROR  
**Address:** 5187 EMPEROR'S WAY  
NEW BRUNSWICK, NJ 08903

**Organization Contact Update**

**Selected Function:** Primary Contact

**Available Functions:**  
SSN/ID Issues  
IS Technical Issues  
SSCR Issues  
FAT/SAR/SIR Issues  
Default Issues

**First Name:** DARTH

**Last Name:** VADER

**Title:** STUDENT LOAN OFFICER

**Phone:** 248-138-9894 **Ext:**

**Fax:** 248-138-9895

**E-Mail:** tatooine@rutgers.edu

**URL:**

**Address:** 5187 EMPEROR

**City:** NEWARK

**State:** NJ

**Zip Code:** 14867

**Last Update By:** DUMMY SCHOOL ID FOR TRAINING  
**Update Date:** 07/14/2000

Submit

Figure 3-28, Organization Contact Update

### 3.5.1.1.2 Organization Contact Delete Confirmation

The Organization Contact Delete Confirmation page (Figure 3-29) allows you to delete a contact on the Organization Contact List. Read the confirmation statement and review the contact information displayed below the confirmation statement. To delete the contact, click Confirm.

The screenshot displays the NSLDS web interface. At the top, there is a navigation bar with the NSLDS logo and tabs for Menu, Aid, Org, Report, and Tran. Below this is a green banner with links: Org Contact List, Org Search, SSCR Cycle, Data Provider Schedule, and Repayment Information. A status bar indicates the user is logged on as 'DUMMY SCHOOL ID FOR TRAINING' from 'RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE'.

On the left, there is a link 'Return To Organization Contact List' with a blue arrow icon. The main content area features a confirmation message: 'You have requested the following Organization Contact be deleted from the system. Click CONFIRM to complete the delete.' Below this, a box displays the contact information for 'RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE'.

**Contact Information:**

- Name: RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE
- Code: 00262900 Type: School
- Status: ERROR
- Address: 5187 EMPEROR'S WAY  
NEW BRUNSWICK, NJ 08903

**Function and Contact Details:**

- Function: PRIMARY CONTACT
- First Name: DARTH
- Last Name: VADER
- Title: STUDENT LOAN OFFICER
- Phone: (248)138-9894
- Fax: (248)138-9895
- E-Mail: [tatooine@rutgers.edu](mailto:tatooine@rutgers.edu)
- URL:
- Address: 5187 EMPEROR'S WAY
- City: NEWARK
- State: NJ
- Zip Code: 14867
- Last Update By: DUMMY SCHOOL ID FOR TRAINING
- Update Date: 07/14/2000

At the bottom of the contact information box, there is a 'Confirm' button.

Figure 3-29, Organization Contact Delete Confirmation

### 3.5.1.2 Organization Contact Add

The Organization Contact Add page (Figure 3-30) allows you to add new contact information for your organization to the NSLDS. To keep your information up-to-date, be sure to maintain accurate contact information so that you, your colleagues, and students can benefit from this feature. By adding your institution's contact information, other users have the appropriate individual to contact to resolve any issues. It is important to note that this information is made available to all the NSLDS users; however, updates to the organization contact information for your institution can only be made by someone at your organization.

To add a new contact:

1. Select or type the contact information in the text boxes.
2. Click **Submit**.

**Notes:**


- Under Available Functions, you may select multiple functions by holding down the SHIFT key or CTRL key and clicking your selections.
- One person in an organization can be assigned multiple functions, but a function can only be assigned to one person in an organization.

The functions are described in the following table:




| Function                                  | Description  |
|---|--|
| Primary Contact                           | For schools, the person responsible for overall NSLDS compliance, including Perkins submissions, SSCR, and overpayment reporting. For guaranty agencies, the person responsible for compliance with monthly data feeds to the NSLDS. This person may <i>not</i> be able to answer questions on individual loans or students. |
| SSN/ID Issues                             | The person who can answer inquiries from schools and other data providers about student identifier conflicts. In most cases, the contact should be familiar with the monthly data provider feeds to the NSLDS, either Perkins or FFEL.   |
| IS (Information Systems) Technical Issues | The person who can answer questions about the technical specifications of a school's or guaranty agency's computing environment.   |
| SSCR Issues                               | For schools, the person responsible for supplying enrollment information directly to the NSLDS or to the school's servicer. For guaranty agencies, the person responsible for updating loan records with enrollment data.  |
| FAT/SAR/ISIR Issues                       | For schools, this person should be able to address a variety of financial aid issues, including Perkins, FFEL, Direct Loan, Aid Overpayment, and Pell Grant issues. For guaranty agencies, this person should be able to address the most recent information submitted to the NSLDS on a particular student.                 |

| Function                      | Description  |
|-------------------------------|--|
| Default Issues                | For schools and guaranty agencies, the person involved in loan servicing who can respond to inquiries about an individual loan's repayment status.   |
| Overpayment Issues            | The school contact responsible for inputting and updating overpayment information.   |
| Federal Perkins Issues        | The school contact who can monitor cumulative amounts and discuss Perkins eligibility for individual students.   |
| FFEL Issues                   | The school contact who can monitor cumulative amounts and discuss FFEL eligibility. For guaranty agencies, the person who can answer school inquiries on eligibility.  |
| Direct Loan Issues            | The school contact who can monitor cumulative amounts and discuss Direct Loan eligibility.   |
| Pell Grant Issues             | The school contact whom can respond to Pell disbursement inquiries from other schools.   |
| Cohort Default Rate Issues    | For schools, the person who monitors the school's default rates or manages the school's default prevention program. For guaranty agencies, the person who can respond to school inquiries about default rates. |
| Perkins Data Provider Contact | The school or school servicer contact for monthly Perkins submissions. This person should be able to answer questions about the individual data elements that are reported to the NSLDS.                       |
| Guaranty Agency Contact       | For guaranty agencies, this person should be the same as the primary contact.  |
| Lender NSLDS Contact          | Guaranty agencies should supply the contact person at specific lenders.  |
| Customer Service              | Borrowers main point of contact.   |
| Transfer Monitor              | The school contact who submits Inform and/or receives Alert information on transfer students.  |






[Menu](#) [Aid](#) [Org](#) [Report](#) [Tran](#)

[Org Contact List](#) | [Org Search](#) | [SSCR Cycle](#) | [Data Provider Schedule](#) | [Repayment Information](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TALLADEGA COLLEGE](#)


  
Return To Organization  
Contact List

**Name:** TALLADEGA COLLEGE  
**Code:** 00104600 **Type:** School  
**Status:** ERROR  
**Address:** 627 WEST BATTLE STREET  
TALLADEGA, AL 35160

**Organization Contact Add**

**Available Functions:**

SSN/ID Issues  
IS Technical Issues  
SSCR Issues  
FAT/SAR/ISIR Issues  
Default Issues



**First Name:**

**Last Name:**

**Title:**

**Phone:**  **Ext:**

**Fax:**

**E-Mail:**

**URL:**

**Address:**

**City:**

**State:**

**Zip Code:**

Figure 3-30, Organization Contact Add

## 3.5.2 Organization Search

The Organization Search page (Figure 3-31) allows you to find an organization. An organization can be a school, guaranty agency, lender, lender branch servicer, FDLP servicer, or the U.S. Department of Education. The Organization Search page helps you find only those organizations that are in the NSLDS.

The Organization Search Bar is located directly below the Navigation Bar. The Type, Code, and Name boxes appear here. Below this, the Optional filter criteria appears, where the search results can be filtered by typing and selecting information in the City and State boxes. When an organization is retrieved or selected, the organization identifier information appears at the top of each organization page.

To search for an organization:

1. Select the **Type** of organization you want to search for by clicking the down-arrow.
2. Type the **Code** or **Name** of the organization.
3. Click **Retrieve**.

**Notes:**


- The search results will match or closely match the information you selected or typed in the boxes. Click the numbered bullet next to the Name to view more information.
- The Code or Name can be typed partially in the respective text boxes in order to retrieve search results (i.e., you can type 'J', rather than 'John Doe University', in the Name box).
- If the organization you are searching for does not appear on the list, alter the punctuation and spelling. You must type the name exactly as it appears in the NSLDS. For example, if you are searching for California State University in Sacramento, it must be typed 'California State University-Sacramento'. If you type 'California State University, Sacramento', it will not appear on the list.

To filter the search results:

1. In the **City** box, type in a city.
2. In the **State** box, select a state by clicking the down-arrow.
3. Click **Retrieve**.
4. Click **Clear** to clear the City and State boxes.

**Note:**

The filtered search results appear according to the information you selected or typed in the boxes. Click the numbered bullet next to the Name to view more information.



Menu   Aid   **Org**   Report   Tran

[Org Contact List](#) | [School Profile](#) | **[Org Search](#)** | [SSCR Cycle](#) | [Data Provider Schedule](#) | [Repayment Information](#)

Type:    Code:    Name:   

Logged on as: SANDRA D PLEGER from [Department of Education Region 0](#)

Optional filter criteria

City:

State:

Figure 3-31, Organization Search

### 3.5.2.1 Organization Search Pop-Up Window

This tool is accessible only from specific reports.

The Organization Search Pop-up Window page (Figure 3-32) is a quick and easy tool for you to find an organization's name or code. It lists organization names and codes of schools, guaranty agencies, lenders, lender branch servicers, FDLP servicers, or U. S. Department of Education regions.

To search for an organization:

1. Type either the **Name** or the **Code** of the organization you wish to search for in the corresponding search boxes. Type a partial name or code, and the closest matches will be displayed.
2. Click **Submit**.
3. To clear search criteria, click **Clear**.

The results of the search include the organization names and codes that match your requested criteria or the closest matched organizations. This list displays a maximum of 50 organizations. To select an organization, click the numbered bullet next to the organization name. The Organization Search Pop-up Window page automatically closes, and the organization code appears in the code box.

To filter the search results:

1. In the **Filter City** box, type in a city.
2. In the **Filter State** box, select a state by clicking the down-arrow.
3. Click **Submit**.

**Organization Search Popup (ORGSRCH) - Netscape**

**Select an Organization** ? **close**

Search By: SCHOOL

Name:

Code:

Filter City:

Filter [State](#):

SCHOOL Search results

| Name                               | Code     |
|------------------------------------|----------|
| <b>1</b> WAINSCOTT                 | 00000100 |
| LONDON, FC                         |          |
| <b>2</b> MARRY ENGINEERING COLLEGE | 00000101 |
| ARLINGTON, VA                      |          |
| <b>3</b> UNKNOWN                   | 00000200 |

Figure 3-32, Organization Search Pop-Up Window

### 3.5.3 SSCR Cycle Selection

The SSCR Cycle Selection page (Figure 3-33) displays the existing SSCR cycle selection or a default cycle set to bimonthly. From this page, you can change the months your organization should receive SSCR rosters, and you can choose the sort order in which you wish to receive your SSCR roster.

The SSCR Cycle Selection table displays the following information:

- **Cycle Number**—The number representing one complete pass through the SSCR process. This extends from generation of the SSCR Roster file through the receipt of the Error Notification file by the NSLDS.
- **Month**—The calendar month.
- **Last Generated**—The date that an SSCR Roster was generated.
- **Required Indicator**—The indicator requesting an SSCR Roster for a specified month.

To change the SSCR Roster Cycle:

1. Click **Quarter**, **Semester**, or **Other**.
2. Click the **Required Indicator** check boxes for the months that you wish to receive a roster. You must click at least two.
3. On the **Roster Sort Selection** list, click **Student Name** or **Student SSN**. The Roster Sort Selection option allows you to determine whether the roster will be sorted by Name or by SSN.
4. Click **Submit**.

**Notes:**

The SSCR process lets you determine how your school can best meet its reporting requirements. You may choose up to six cycles each year. When establishing your schedule, you must comply with the following:

- Regular term-based schools (semester, quarter, or trimester) must complete at least one SSCR cycle each regular term. A summer session does not count as a term.
- Schools that do not use regular terms must complete at least two SSCR cycles each year at dates that they choose, but the dates must be at least four months apart.
- All reporting cycles must be at least 60 days apart.

If you choose not to receive your SSCR Roster every 60 days, you must report enrollment status changes in ad hoc reports within 30 days of the status change.

**NSLDS** Menu Aid Org Report Tran

Org Contact List | Org Search | **SSCR Cycle** | Data Provider Schedule | Repayment Information

Logged on as: DUMMY SCHOOL ID FOR TRAINING from TROY STATE UNIVERSITY AT DOTHAN

**Name:** TROY STATE UNIVERSITY AT DOTHAN  
**Code:** 00104800 **Type:** School  
**Status:** ERROR  
**Address:** 501 UNIVERSITY DRIVE, PO BOX 8368  
DOTHAN, AL 36304

**SSCR Cycle Selection**

? Before submitting, please select one.

☐ Quarter ☐ Semester ☐ Other

| Cycle Number | Month     | Last Generated | Required Indicator       |
|--------------|-----------|----------------|--------------------------|
| 1            | January   | .              | <input type="checkbox"/> |
| 2            | February  | .              | <input type="checkbox"/> |
| 3            | March     | .              | <input type="checkbox"/> |
| 4            | April     | .              | <input type="checkbox"/> |
| 5            | May       | .              | <input type="checkbox"/> |
| 6            | June      | .              | <input type="checkbox"/> |
| 7            | July      | .              | <input type="checkbox"/> |
| 8            | August    | .              | <input type="checkbox"/> |
| 9            | September | .              | <input type="checkbox"/> |
| 10           | October   | .              | <input type="checkbox"/> |
| 11           | November  | .              | <input type="checkbox"/> |
| 12           | December  | .              | <input type="checkbox"/> |

? Roster Sort Selection : --- Select ---

Submit

Figure 3-33, SSCR Cycle Selection

### 3.5.4 Data Provider Schedule

The Data Provider Schedule page (Figure 3-34) displays a history of current, past, and future scheduled data provider submittals. The table is populated with information based on your logon ID and cannot be updated from this page.

The Data Provider Schedule displays a list of up to 50 submittals. Data providers who have more than 50 submittals will see future submittals with the balance consisting of the most recent submittals. The records are sorted in descending order by the Scheduled Submittal Date and by the Received Date. Data providers who do not have a schedule set up with the NSLDS see a message indicating this.

The Data Provider Schedule table displays the following information:


- **Scheduled Submittal Date**—The date the NSLDS expects to process the submittal.
- **Received Date**—The date the NSLDS received the incoming submittal.
- **Processed Date**—The date on which the NSLDS completely processed the submittal.
- **Loan Records Extracted**—The total number of detail records extracted from the data provider database for this submission. This number may include records that were in error and did not update the NSLDS database.
- **Loans with Errors**—The total number of detail records extracted from the data provider database that included errors and did not update the NSLDS database.
- **Submittal Pass Rate (%)**—The percentage of detail records extracted from the data provider database that contained no errors and updated the NSLDS database.

**Notes:**

The Loans with Errors and Submittal Pass Rate (%) columns will not appear for Guaranty Agency users, or for users viewing an organization other than their own.

The NSLDS no longer provides an Earliest Extract Date. Data providers are expected to provide their information in a timely manner in accordance with the schedule. Submittals are not expected to be made more than one week prior to or after the scheduled submittal date. Submittals made too early will error out. Submittals made too late will not process, and the data provider will receive a “missed submittal” message.





[Menu](#) [Aid](#) [Org](#) [Report](#) [Tran](#)

[Org Contact List](#) | [Org Search](#) | [SSCR Cycle](#) | [Data Provider Schedule](#) | [Repayment Information](#)

Type:  Code:  Name:

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TROY STATE UNIVERSITY AT DOTHAN](#)

**Name:** TROY STATE UNIVERSITY AT DOTHAN  
**Code:** 00104800 **Type:** School  
**Status:** ERROR  
**Address:** 501 UNIVERSITY DRIVE, PO BOX 8368  
DOTHAN, AL 36304

**Data Provider Schedule**

| Scheduled Submittal Date | Received Date | Processed Date | Loan Records Extracted | Loans with Errors | Submittal Pass Rate(%) |
|--------------------------|---------------|----------------|------------------------|-------------------|------------------------|
| 10/29/1999               | N/A           | N/A            | N/A                    | N/A               | N/A                    |

Figure 3-34, Data Provider Schedule

### 3.5.5 Repayment Information

The Repayment Information page (Figure 3-35) displays the current repayment status of certain borrowers in FFEL and Direct Loan (DL) programs who attended a school during a specific period. This information has no relationship to the calculation of a draft or final cohort default for a school and is not used in that process. This data is provided solely for information and may not be used in any administrative procedure. The information reported is based on information provided by the guaranty agency that guaranteed the loan or by the Direct Loan servicer. The Repayment Information table includes the following details:

- **Numerator Date Range**—Identifies the 24-month period used to determine whether any borrowers have defaulted or met other specified conditions on FFEL and DL program loans that entered repayment in the first 12 months of the identified 24-month period.
- **Denominator Date Range**—Identifies the 12-month period used to determine the borrowers that have entered into repayment on FFEL and DL program loans.
- **FFEL Num**—The total number of borrowers that entered repayment on FFEL program loans during a specified 12-month period and have defaulted on those loans during the same 12-month period or the next 12-month period.
- **FFEL Denom**—The total number of borrowers that entered repayment on FFEL program loans during a specified 12-month period.
- **%**—FFEL student repayment history rate.
- **DL Num**—The total number of borrowers that entered repayment on DL program loans during a specified 12-month period and have defaulted on those loans during the same 12-month period or the next 12-month period.
- **DL Denom**—The total number of borrowers that entered repayment on DL program loans during a specified 12-month period.
- **%**—Direct loan student repayment history rate.
- **Dual Num**—The total number of borrowers that entered repayment on FFEL and DL program loans during a specified 12-month period and have defaulted on those loans during the same 12-month period or the next 12-month period.
- **Dual Denom**—The total number of borrowers that entered repayment on FFEL and DL program loans during a specified 12-month period.
- **%**—Dual student repayment history rate.
- **Date Processed**—Identifies the date the Student Repayment History Report was processed.

To request Repayment Information Loan Detail for the latest month from the Report Parameters page, click **Request Loan Detail for latest month**.

**NSLDS** Menu Aid Org Report Tran

Org Contact List | Org Search | SSCR Cycle | Data Provider Schedule | **Repayment Information**

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TROY STATE UNIVERSITY AT DOTHAN](#)

**Name:** TROY STATE UNIVERSITY AT DOTHAN  
**Code:** 00104800 **Type:** School  
**Status:** ERROR  
**Address:** 501 UNIVERSITY DRIVE, PO BOX 8368  
 DOTHAN, AL 36304

**Repayment Information**

Request Loan Detail for latest month

The following information reflects the current repayment status of certain borrowers in FFEL and Direct loan programs who attended a school during a specific period. This information has no relationship to the calculation of draft or official cohort default rates for a school and will not be used in that process. This data is provided solely for informational purposes and may not be used in any administrative procedure. The information reported is based on information provided by the Guaranty Agency that guaranteed the loan or by the Direct loan Servicer.

|   | Numerator Date Range | Denominator Date Range | FFEL Num | FFEL Denom | %    | DL Num | DL Denom | %   | Dual Num | Dual Denom | %    | Date Processed |
|---|----------------------|------------------------|----------|------------|------|--------|----------|-----|----------|------------|------|----------------|
| 1 | 12/1997-11/1999      | 12/1997-11/1998        | 199      | 765        | 26.0 | 50     | 2266     | 2.2 | 243      | 1777       | 13.6 | 12/28/2000     |
| 2 | 12/1997-11/1999      | 12/1997-11/1998        | 192      | 745        | 25.7 | 71     | 1266     | 5.6 | 241      | 1712       | 14.0 | 12/28/1999     |

Figure 3-35, Repayment Information

### 3.5.6 Cohort Default Rate History List

The Cohort Default Rate History List (Figure 3-36) page allows you to view a history of the default rates for the selected organization and request Loan Details. Below the search bar, the school's Name, OPEID Code, Status, and Address appear as reported by the Postsecondary Education Participants System (PEPS). (**Note: ED users are restricted as to which of the following they are allowed to view.**)

The Status can be one of the following:

- **Open**—School is an open institution.
- **Closed**—School has been reported as closed.
- **Merged**—School has merged with another institution. This will also display the OPEID number of the institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution.

The Cohort Default Rate History List table displays the following:

- **Fiscal Year**—October through following September 30 during which a default request was calculated.
- **Originating/Current**—If viewing a lender rate, an indicator of lender status as it relates to loans for the selected organization. The lender statuses are defined as follows:
  - **OL**—Originating
  - **CL**—Current
- **Rate Type**—The status of an organization's defaulted borrower calculation. The Rate Types are defined as follows:
  - **Official**—A default rate authorized for viewing by all organizations.
  - **Official Susp'd**—A default rate that has been appealed by the school.
  - **Draft**—A default rate that is available for viewing only by the rated organization and the Default Management Division of the Department of Education.
- **Rate Sub Type**—Within each rate type there are five possible sub types that can be in effect for a default rate history occurrence. The Rate Sub Types are defined as follows:
  - **ACTUAL**—The “raw” rate calculated using the actual list of borrowers of a school prior to any adjustments.

- **AVERAGE**—The rate used for a school with 20 or fewer borrowers entering repayment during a fiscal year that had a cohort default rate calculated for the two previous fiscal years.
- **COMBINED**—The rate is calculated from the defaulted borrowers of schools that have been grouped together.
- **MERGED**—The rate is calculated from the defaulted borrowers of schools that have been merged.
- **LEAD SCH COMBO**—The rate is taken from a lead school in a group of schools.
- **SUBSTITUTED**—The calculated rate was replaced by a rate that was derived through other means.
- **Program Type**—The Title IV loan programs for which loans were issued by an organization. The Program Types are defined as follows:
  - **Dual**—An organization that provides both FFEL and Direct loan types.
  - **FFEL**—An organization that provides loans within the Federal Family Education Loan program.
  - **Direct**—An organization that provides loans within the William D. Ford Direct Loan program.
- **Numerator**—The total number of borrowers that entered repayment on a loan program during the cohort year and have defaulted on those loans during the same cohort year or the next cohort year.
- **Denominator**—The total number of borrowers that entered repayment on a loan program during the cohort year.
- **Rate**—The default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
- **Process Date**—Identifies the date that the rates were calculated.

The **Request Loan Details** button appears above the table, which enables you to submit a request for the loan records that correlate with a selected Cohort Default Rate. Click **Request Loan Details** to link to the Report Parameters page (the Reports Parameters page will also display the Cohort Default Rate History List table).

**Notes:**

- The Rate Type column is only applicable: when viewing cohort default rate history where the users are viewing their own rates; when viewing schools where the users belong to ED's Default Management Division; or when viewing GAs or Lenders where the users belong to ED's Financial Partners, Partner Service.
- The Rate Sub Type column is only applicable when viewing cohort default rate history for schools where the users belong to ED's Default Management Division.
- The Program Type column is only applicable when viewing cohort default rate history for schools where the users are viewing their own rates or when the users belong to ED. ED users belonging to the Default Management Division will view columns for Numerator, Denominator and Rate broken out by Program Type when viewing a school's cohort default rate history. Cohort default rate history for Lenders and GAs only display values for the FFEL program.
- The Originating/Current column is only applicable when viewing cohort default rate history for Lenders.

**NSLDS** Menu Aid Org Report

Org Contact List | School Profile | Org Search | SSCR Cycle | Data Provider Schedule | Repayment Information | **Cohort Default Rate** | Cohort Default Rate Ed

Type: --- Select --- Code: Name: Retrieve

Logged on as: LISA LAYDEN from Department of Education Region 0

Name: FAULKNER UNIVERSITY - FLORENCE CENTER  
Code: 00100302 Type: School  
Status: CLOSED  
Address: 1626 FLORENCE BOULEVARD  
FLORENCE, AL 356302749

**Cohort Default Rate History List**

Request Loan Details

| Fiscal Year | Rate Type | Program Type | Numerator | Denominator | Rate | Process Date |
|-------------|-----------|--------------|-----------|-------------|------|--------------|
| 1998        | OFFICIAL  | FFEL         | 70        | 815         | 8.5  | 09/27/2000   |
| 1997        | OFFICIAL  | FFEL         | 73        | 804         | 9    | 08/28/1999   |
| 1996        | OFFICIAL  | FFEL         | 86        | 755         | 11.3 | 09/26/1998   |
| 1995        | OFFICIAL  | FFEL         | 87        | 630         | 13.8 | 09/27/1997   |
| 1994        | OFFICIAL  | FFEL         | 53        | 477         | 11.1 | 11/02/1996   |
| 1993        | OFFICIAL  | FFEL         | 41        | 475         | 8.6  | 01/14/1996   |

The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.

Figure 3-36, Cohort Default Rate History List

### 3.5.7 School Profile

The School Profile page (Figure 3-37) allows you to view Title IV grant and loan programs, as well as the school's academic and program schedule information.

The screenshot displays the NSLDS (National Student Loan Data System) interface. At the top, there is a navigation bar with links: Menu, Aid, Org, Report, and Tran. Below this is a search bar with fields for Type (set to SCHOOL), Code, and Name, and a Retrieve button. The user is logged in as SANDRA D PLEGER from the Department of Education Region 0.

The main content area is titled "School Profile" and contains the following information:

**Name:** UNIVERSITY OF CALIFORNIA - SANTA CRUZ  
**Code:** 00132100 **Type:** School  
**Status:** OPEN  
**Address:** 1156 HIGH STREET  
 SANTA CRUZ, CA 950640001

**Program Length:** 8 - MASTER'S DEGREE OR DOCTOR'S DEGREE  
**School Type:** 1 - PUBLIC  
**Ethnic Code:** 5 - ETHNICITY NOT REPORTED  
**Certification Type:** C - CERTIFIED  
**Academic Calendar:** QH - QUARTER CREDIT HOURS  
**Congressional District:** 17  
**Eligibility Status:** Y  
**Change of Affiliation Code:**  
**Change of Affiliation Effective Date:**  
**Region Code:** 09 - SAN FRANCISCO, CA  
**Location Reason:**  
**Approval Indicator:** Y  
**Initial Approval Date:** 12/01/1965  
**Disapproval Date:**  
**System Funded Office:** N  
**Branch Indicator:** N  
**FDSLPL Origination Level:** 1 - OPTION 2 (SCHOOL ORIGINATES, HANDLES PNOTES, DRAWS \$)  
**FDSLPL Origination End Reason:**  
**FDSLPL End Reason:**

**Program Status**

**Pell Start Date:** 12/01/1965  
**Pell End Date:** 12/31/9999  
**FFEL Stafford Start Date:** 01/01/1985  
**FFEL Stafford End Date:** 12/31/9999  
**FFEL Stafford Unsubsidized Start Date:** 12/01/1965  
**FFEL Stafford Unsubsidized End Date:** 12/31/9999  
**FFEL PLUS Start Date:** 12/01/1965  
**FFEL PLUS End Date:** 12/31/9999  
**FDSLPL Stafford Start Date:** 04/01/1995  
**FDSLPL Stafford End Date:** 12/31/9999  
**FDSLPL Stafford Unsubsidized Start Date:** 04/01/1995  
**FDSLPL Stafford Unsubsidized End Date:** 12/31/9999  
**FDSLPL PLUS Start Date:** 04/01/1995  
**FDSLPL PLUS End Date:** 12/31/9999  
**Perkins Start Date:** 12/01/1965  
**Perkins End Date:** 12/31/9999  
**SEOG Start Date:** 12/01/1965  
**SEOG End Date:** 12/31/9999

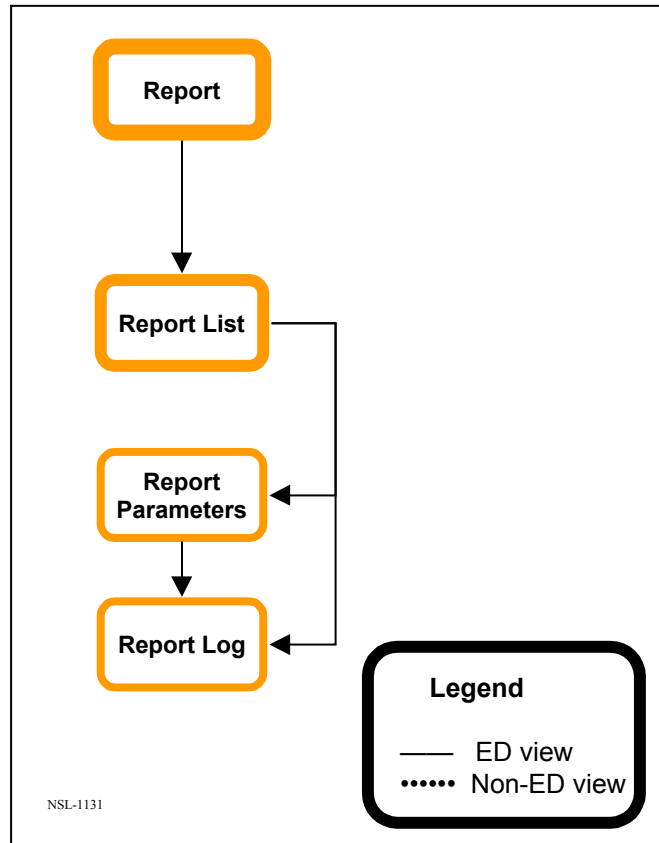
**School Status**

**Action Code:** 05 - REAPPROVE ELIG/FULL CERT  
**Action Reason Code:** 12 - MEETS REQUIREMENTS  
**Effective Date of Combination:** 06/09/1997

Figure 3-37, School Profile

## 3.6 Reporting

The Reporting page allows you to retrieve a list of reports generated from the NSLDS data. Click Report List to view the list of reports. From the Report List page, you can select Report Parameters or link to a Report Log.



*Figure 3-38, Report Diagram*



### 3.6.1 Report List

The Report List page (Figure 3-39) displays a list of reports available for your retrieval. The list includes the Report ID, the Names, and the Log Page link. The reports listed are determined by your user ID. A search feature is also included on this page.

The Report List table displays the following information:

- **Report ID**—A six-character identifier for each report. The first two or three characters are acronyms that identify the category of the report. The last three or four characters represent the specific report name. For example, GAERRS represents a report for Guaranty Agencies (GA) that lists their loan error rates and top 10 errors (ERRS).

The following table identifies the acronyms for each report category:

| Acronym | Report Category  |
|---------|--|
| APR     | Audit and Program Review Planning                                |
| DRC     | Default and Notional Reports Rate Calculations                   |
| GA      | Guaranty Agency  |
| MBR     | Monitoring Guaranty Agency and Lender Billings for Reasonability |
| RCS     | Refund Cancellation Support                                      |
| SCH     | School   |

- **Names**—Titles of the reports.
- **Log Page**—A link to the Report Log page. The Report Log table displays detailed information pertaining to the report including Requested By, Output Medium, Sort, Parameters, Begin Date/Time, End Date/Time, and Report Type.

You can scroll sequentially through the reports using the scroll bar or access a report directly using the Search Report ID box. A maximum of 50 reports display on one page. If the page includes more than 50 reports, the Next 50 option displays for easy access to the next reports.

To search for a report using the Search Report ID box:

1. In the **Search Report ID** box, enter the report ID (or partial ID).
2. Click **Submit**.

The Report ID and Names display at the top of the Report List (or the closest match to your request). To request a report, click the highlighted number in the Report ID column. The Report Parameters page displays. To view a Report Log, click the Log Page icon (this appears as a scroll graphic), which links to the Report Log page.



Menu
Aid
Org
Report





Report List

Logged on as: LISA LAYDEN from [Department of Education Region 0](#)

**Report List**

Search Report ID:

| Report ID                 | Names                               | Log<br>Page   |
|---------------------------|-------------------------------------|---|
| <a href="#">1</a> APR001  | REPORT OF FFEL LOAN DISBURSEMENTS   |    |
| <a href="#">2</a> APR002  | AGENCY PORTFOLIO STATUS REPORT      |    |
| <a href="#">3</a> APR003  | LENDER PORTFOLIO STATUS REPORT      |    |
| <a href="#">4</a> APR023  | BORROWER SSN SEARCH                 |    |
| <a href="#">5</a> APR024  | BORROWER NAME SEARCH                |    |
| <a href="#">6</a> APR025  | SCHOOL SUMMARY INFORMATION          |    |
| <a href="#">7</a> APR026  | SCHOOL SUMMARY REPORT               |    |
| <a href="#">8</a> APR028  | LOANS HELD BY LENDER                |    |
| <a href="#">9</a> DRC010  | SCHOOL REPAYMENT INFO LOAN DETAIL   |    |
| <a href="#">10</a> DRC015 | SCHOOL REPAYMENT INFO LOAN DETAIL   |   |
| <a href="#">11</a> DRC029 | ED COHORT DEFAULT RATE HISTORY RPT  |  |
| <a href="#">12</a> DRC035 | SCHOOL COHORT DEFAULT RATE HIST RPT |  |
| <a href="#">13</a> EBA005 | PEPS SCHOOL VOL AGGREGATE EXTRACT   |  |
| <a href="#">14</a> GAERRS | GA LOAN ERROR RATES & TOP 10 ERRORS |  |
| <a href="#">15</a> GA005A | LOAN PROFILE DATA BY SSN            |  |
| <a href="#">16</a> GA010A | GA HISTORY ATTRIBUTE QUERY          |  |
| <a href="#">17</a> RCS002 | LENDER LOAN CANCELLATION REPORT     |  |
| <a href="#">18</a> SCH01A | EXIT COUNSELING BY SSN              |  |
| <a href="#">19</a> SCH01B | EXIT COUNSELING                     |  |
| <a href="#">20</a> SCH06A | SCHOOL HISTORY ATTRIBUTE QUERY      |  |

Figure 3-39, Report List

### 3.6.1.1 Report Parameters

The Report Parameters page (Figure 3-40) allows you to choose the Type (report or extract) and the Report Parameters, including the Sort By and the Output Medium for a report. The Type, Report Parameters, and Sort By options can differ for each report. The Output Medium option is based upon your User ID.

The Report ID box appears at the top of the page and displays the ID, Type, and Name of the report.

To request a report:

1. In the **Type** list, click **Extract** or **Report**, if available.
2. In the **Sort By** list, click an option, if available.
3. In the **Output Medium** list, click an option, if available.
4. Click **Submit**.
5. After the page redisplay and you verify your parameters, click **Confirm**.

**Notes:**

- The Output Medium is an option based on user profile.
- School users will only be able to view or print their report from their Title IV WAN mailbox—the TG number assigned when they applied for access to the NSLDS. Each online user has a separate TG number and therefore will find the requested report in that specific mailbox.
- For assistance in retrieving information from the Title IV WAN mailbox, call 1-800-615-1189.
- Reports use the following message classes:

SHCDREOP = Extract format of LRDR

SHCDRROP = Report format of LRDR

SHNOTROP = Report format of Repayment Information

SHNOTEOP = Extract format of Repayment Information

AHSLDSOP = Other Web reports (e.g., exit counseling)

If an error occurs, your page redisplay requesting that you enter the required data.

- Your suggestions for improving reports that you would like to receive are welcome. Please e-mail your suggestions to [NSLDSCOE@raytheon.com](mailto:NSLDSCOE@raytheon.com).

**NSLDS**

Menu Aid Org **Report**

[Report List](#)

Logged on as: LISA LAYDEN from [Department of Education Region 0](#)

Return to Report List

ID: APR001 Type: Extract

Name: REPORT OF FFEL LOAN DISBURSEMENTS

Go to Report Log

**Report Parameters**

SCHOOL CODE:  Org Search

LENDER CODE:  Org Search

LOAN DISBURSEMENT BEGIN DATE:  MM/DD/CCYY

LOAN DISBURSEMENT END DATE:  MM/DD/CCYY

Sort By:

Output Medium:

Submit

This is an example of the type of data that NSLDS can supply in report/extract format. We would like to hear from you on ways to improve this report or about new reports that you would like to see. Please e-mail us your comments and requests to [NSLDSCOE@raytheon.com](mailto:NSLDSCOE@raytheon.com)


Figure 3-40, Report Parameters

### 3.6.1.2 Report Log




The Report Log page (Figure 3-41) keeps a record of each report requested by your organization along with the requesting individual and the date. The report's ID and Name display at the top of the page. Each time a user requests a report, the NSLDS registers the following information:

- **Requested By**—The requestor's name.
- **Output Medium**—The output device the user selected for the report.
- **Sort**—The number corresponding to the sort option selected. (The sort options vary depending on the selected report.)
- **Parameters**—The variables selected that determined the report's results.
- **Begin Date/Time**—The date and time the report was requested.
- **End Date/Time**—The date and time the report was completed. (N/A means that the report has not completed processing.)
- **Report Type**—This identifies whether the report was in a report format or an extract file.

The most recent request appears at the top of the page. A maximum of 50 records display on one page. If the report includes more than 50 records, you can click the Next Group arrow.




[Menu](#) [Aid](#) [Org](#) [Report](#)


  

[Report List](#)

Logged on as: LISA LAYDEN from [Department of Education Region 0](#)

 Return to Report List

ID: APR001  
Name: \$ED0 REPORT OF FFEL LOAN DISBURSEMENTS

 Go to Report Parameters

**Report Log**

|                       |                                    |                         |                       |
|-----------------------|------------------------------------|-------------------------|-----------------------|
| <b>Requested By:</b>  | SYLVIA H BENTLEY                   | <b>Begin Date/Time:</b> | 06/12/2001 4:00:38 PM |
| <b>Output Medium:</b> | DOWNLOAD                           | <b>End Date/Time:</b>   | 06/12/2001 4:30:55 PM |
| <b>Sort:</b>          | 1                                  | <b>Report Type:</b>     | Extract               |
| <b>Parameters:</b>    | 033093;Space;01/01/1997;06/12/2001 |                         |                       |
| <b>Requested By:</b>  | ANTHONY P. JONES                   | <b>Begin Date/Time:</b> | 05/10/2001 1:21:11 PM |
| <b>Output Medium:</b> | DOWNLOAD                           | <b>End Date/Time:</b>   | 05/10/2001 2:57:34 PM |
| <b>Sort:</b>          | 3                                  | <b>Report Type:</b>     | Extract               |
| <b>Parameters:</b>    | 010351;Space;01/01/1983;01/01/1994 |                         |                       |
| <b>Requested By:</b>  | ANDREW J LAWRENCE                  | <b>Begin Date/Time:</b> | 01/31/2001 1:32:49 PM |
| <b>Output Medium:</b> | DOWNLOAD                           | <b>End Date/Time:</b>   | 01/31/2001 2:05:26 PM |
| <b>Sort:</b>          | 1                                  | <b>Report Type:</b>     | Extract               |
| <b>Parameters:</b>    | 030630;Space;10/24/2000;01/21/2001 |                         |                       |
| <b>Requested By:</b>  | JUDY THOMAS                        | <b>Begin Date/Time:</b> | 01/05/2001 1:33:38 PM |

Figure 3-41, Report Log

## 3.7 Transfer Monitoring

The Transfer Monitoring pages allow you to view and modify transfer student information.

### **Disclaimer**

The Transfer Monitoring pages are only available and viewable to school users (i.e., the Tran menu tab only appears for school users).

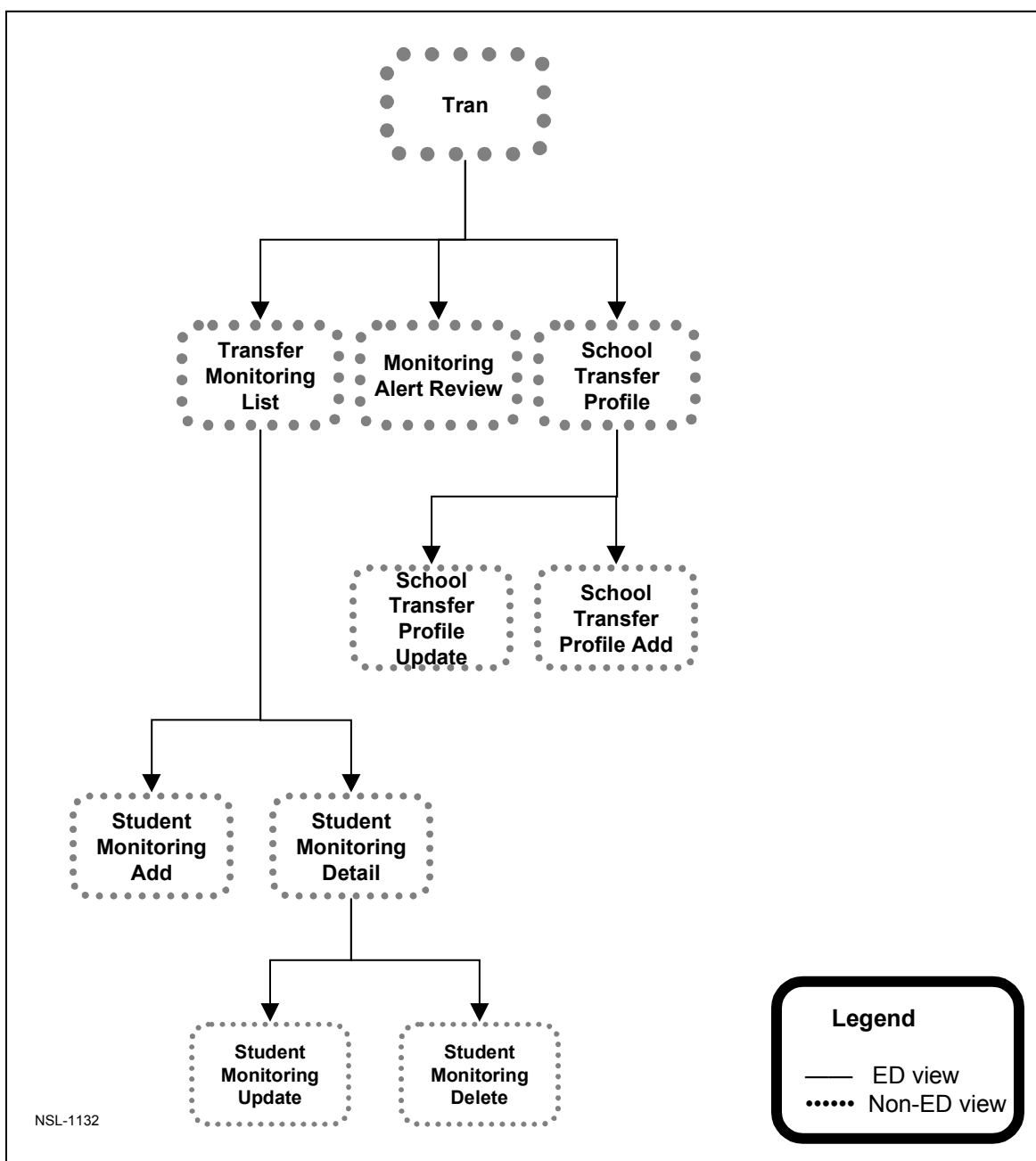


Figure 3-42, Transfer Monitoring Diagram

## The Transfer Monitoring Process

*First*, fill out the **School Transfer Profile Add** page. On this page, the school's contact information is entered and how they would like to receive Alerts—at [www.nsldsfp.ed.gov](http://www.nsldsfp.ed.gov) or by batch via Title IV WAN. If the school chooses to receive Alerts at [www.nsldsfp.ed.gov](http://www.nsldsfp.ed.gov), the school's email notification instructs the school to access the Web site for updates.

*Second*, to add a student to the monitoring list via the Web site, the school must complete the **Student Monitoring Add** page. On this page, the school informs NSLDS which students the school needs to have monitored. Type the Enrollment Begin Date (the date that the student is expected to begin at the school); and the Monitor Begin Date or accept the system default date (the date NSLDS uses to start monitoring).

Or, another way to inform NSLDS is to send a batch file through Title IV WAN. The school can even change their method to inform NSLDS without notifying us that they are changing their method.

*Third*, view the **Monitoring Alert Review** page. On this page, the school can monitor the list of changes that NSLDS sends the school regarding student aid information that may impact eligibility for the current award year.

NSLDS sends an email to the contact listed on the School Transfer Profile page stating that an alert file for the school is available. NSLDS monitors only those student records submitted through this Transfer Monitoring process. NSLDS does not alert the school about changes originating from the school. This process does not take the place of the current Postscreening process, which notifies schools of default and overpayment changes.



### 3.7.1 Transfer Monitoring List

The Transfer Monitoring List page (Figure 3-43) lists all transfer students submitted by the school to be monitored by the NSLDS for reported changes. It only shows the students submitted by the school associated with the user ID of the user viewing the list.

To sort/filter and retrieve a Transfer Monitoring List:


1. In the **Sort By** list, click the sort criteria.
2. In the **Display Only** boxes, type in the display criteria that you wish to view.
3. Click **Retrieve** to view the sorted/filtered list.

The Transfer Monitoring List information is defined as follows:




- **SSN**—The student's Social Security Number. (The blue numbered icon next to the SSN will change with sorting. If you click the icon, it will take you to the Transfer Monitoring Detail page for that student. If a student has had an Alert sent from the NSLDS, there will be an Alert icon displayed next to the SSN.)
- **Name**—The student's name. (The Transfer Monitoring List by default is displayed in alphabetical order by last name, but you can change how the list is sorted.)
- **DOB**—The student's Date of Birth.
- **Enrollment Begin Date**—The date on which the student is expected to, or did begin classes at the school.
- **Monitor Begin Date**—The date on which NSLDS began monitoring the student.
- **Last Changed By**—The name of the user who last changed the student's record, or the name of the user who added the student to the list and the associated date.

**Notes:**

- The **Add Student to Monitor List** button at the top of the page will take you to the Student Monitoring Add page when you click it.
- If a student was added/updated via a batch file, the Last Changed By will read Batch.



[Menu](#) [Aid](#) [Org](#) [Report](#) [Tran](#)

[Transfer Monitoring List](#) | [Monitoring Alert Review](#) | [School Transfer Profile](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE](#)

Add Student to Monitoring List

Sort By:

Display Only: SSN:

Last Name:

Enrollment Begin Date:  (MMDDCCYY)

Monitor Begin Date:  (MMDDCCYY)

Last Changed By:

Retrieve

 [PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-43, Transfer Monitoring List

### 3.7.1.1 Student Monitoring Add

The Student Monitoring Add page (Figure 3-44) allows you to add a student to the Transfer Monitoring List. If the user is adding a student to the Transfer Monitoring List who is not in the NSLDS database, the student will only be added to the Transfer Monitoring List and will not display on any other pages in the NSLDS FAP site.

To add a student to the Transfer Monitoring List:

1. In the **SSN** box, type the student's Social Security Number. (The SSN appears automatically if you linked from the Loan or Pell Grant History pages.)
2. In the **First Name** box, type the student's first name. (The First Name appears automatically if you linked from the Loan or Pell Grant History pages.)
3. In the **Last Name** box, type the student's last name. (The Last Name appears automatically if you linked from the Loan or Pell Grant History pages.)
4. In the **Date of Birth** box, type the student's date of birth. (The Date of Birth appears automatically if you linked from the Loan or Pell Grant History pages.)
5. In the **Enrollment Begin Date** box, type the date on which the student is expected to, or did begin classes at the school.
6. In the **Monitor Begin Date** box, type the date on which you want NSLDS to begin monitoring the student. The current date will appear by default, although the date can be changed.
7. Click **Submit**.

**NSLDS**

[Menu](#) [Aid](#) [Org](#) [Report](#) [Tran](#)

[Transfer Monitoring List](#) | [Monitoring Alert Review](#) | [School Transfer Profile](#)

SSN:  First Name:  DOB:  (MMDDCCYY) [Retrieve](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE](#)

[Return To Transfer Monitoring List](#)

**JEANNINE A MARULLO**  
SSN: 043-78-2588 DOB: 01/08/1955

**Student Monitoring Add**

SSN:  043-78-2588

First Name:  JEANNINE

Last Name:  MARULLO

Date of Birth:  01/08/1955 (MMDDCCYY)

Enrollment Begin Date:  (MMDDCCYY)

Monitor Begin Date:  07/24/2001 (MMDDCCYY)

[Submit](#)

[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-44, Student Monitoring Add

### 3.7.1.2 Student Monitoring Detail


The Student Monitoring Detail page (Figure 3-45) displays detailed transfer monitoring student information that can be updated or deleted. The information is defined as follows:

- **SSN**—The student's Social Security Number.
- **Name**—The student's current name in the NSLDS. If the student was added to the Transfer Monitoring List, but is not in the NSLDS, the name will display as provided by the school user.
- **Date of Birth**—The student's date of birth. If the student was added to the Transfer Monitoring List, but is not in the NSLDS, the DOB will display as provided by the school user.
- **Enrollment Begin Date**—The date on which the student was reported to begin classes at the school.
- **Monitor Begin Date**—The date on which the NSLDS began monitoring the student.
- **Last Changed By**—The name of the user who added or last changed the student information and the associated date.




To update or delete the Student Monitoring Detail information, click **Update** or **Delete**.

**Note:**

If a student was added/updated via a batch file, the **Last Changed By** will read Batch.




[Menu](#)
[Aid](#)
[Org](#)
[Report](#)
[Tran](#)

[Transfer Monitoring List](#) | [Monitoring Alert Review](#) | [School Transfer Profile](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE](#)


[Return To Transfer Monitoring List](#)

### Student Monitoring Detail

[Update](#)
[Delete](#)

**SSN:** 043-78-2588

**First Name:** JEANNINE

**Last Name:** MARULLO

**Date of Birth:** 01/08/1955

**Enrollment Begin Date:** 07/22/2001

**Monitor Begin Date:** 07/24/2001

**Last Changed By:** DUMMY SCHOOL ID FOR TRAINING on 07/24/2001



[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-45, Student Monitoring Detail

### 3.7.1.2.1 Student Monitoring Update


The Student Monitoring Update page (Figure 3-46) allows you to update the First Name, Last Name, Date of Birth, Enrollment Begin Date, and/or the Monitoring Begin Date for a student's Transfer Monitoring Detail information.

To update Student Monitoring Detail:




1. Type the **First Name** in the text box.
2. Type the **Last Name** in the text box.
3. Type the **Date Of Birth** in the text box.
4. Type the **Enrollment Begin Date** in the text box.
5. Type the **Monitoring Begin Date** in the text box.
6. Click **Submit**.

**Notes:**

- If you are updating the Monitoring Begin Date to a date in the future, it cannot be later than the Enrollment Begin Date.
- After clicking **Submit**, your name will appear in Last Changed By until the record on the Transfer Monitoring List is changed again.




[Menu](#)
[Aid](#)
[Org](#)
[Report](#)
[Support](#)
[Tran](#)

[Transfer Monitoring List](#) | [Monitoring Alert Review](#) | [School Transfer Profile](#)

Logged on as: LINDA K OLSON from [HEAF CONSOLIDATION LOAN SCHOOL](#)


[Return To Student Monitoring Detail](#)

### Student Monitoring Update

SSN: 111-11-1111

First Name:

Last Name:

Date of Birth:  (MMDDCCYY)

Enrollment Begin Date:  (MMDDCCYY)

Monitor Begin Date:  (MMDDCCYY)



[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-46, Student Monitoring Update



### 3.7.1.2.2 Student Monitoring Delete

The Student Monitoring Delete Confirmation page (Figure 3-47) allows you to delete the student from your school's Transfer Monitoring List. Student Monitoring records should only be deleted if the student will not be attending the school, or the student was added to your school's list in error. Do not delete a student simply to stop monitoring him or her. Once the delete has been confirmed, the student's information will be removed from the Monitoring list and Alert list, if applicable.

To delete the student from the Transfer Monitoring List:

1. Read the confirmation statement.
2. Click **Confirm** (on the bottom of the page).

**Note:**

If a student was added/updated via a batch file, (**Last Changed By**) will read Batch.

The screenshot displays the NSLDS Student Monitoring Delete Confirmation page. At the top, the NSLDS logo is on the left, and navigation links (Menu, Aid, Org, Report, Tran) and utility icons (phone, question mark, X) are on the right. A breadcrumb trail shows 'Transfer Monitoring List | Monitoring Alert Review | School Transfer Profile'. The user is logged in as 'DUMMY SCHOOL ID FOR TRAINING' from 'RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE'. On the left, a 'Return To Student Monitoring Detail' link is available. The main heading is 'Student Monitoring Delete'. A confirmation box states: 'You are asking that this Student Monitoring record be DELETED from your List. Student Monitoring records should be deleted only if the student will not be attending your institution or the student was entered in error. Please do not DELETE a student simply to stop monitoring him or her. To complete this DELETE, please click CONFIRM.' Below this, a box contains the student's details: SSN: 043-78-2588, First Name: JEANNINE, Last Name: MARULLO, Date of Birth: 01/08/1955, Enrollment Begin Date: 07/22/2001, Monitor Begin Date: 07/24/2001, and Last Changed By: DUMMY SCHOOL ID FOR TRAINING on 07/24/2001. A 'Confirm' button is located below the details box. At the bottom, a footer bar contains a home icon and the text 'PRIVACY ACT OF 1974 (AS AMENDED)'.

Figure 3-47, Student Monitoring Delete

### 3.7.2 Monitoring Alert Review

The Monitoring Alert Review page (Figure 3-48) lists all transfer students on a school's Transfer Monitoring List to which changes have been reported and allows you to review the changes.

The Monitoring Alert Review information is defined as follows:

- **Monitoring Results as of**—The date on which the Transfer Monitoring Process last ran.
- **SSN**—The student's Social Security Number.
- **Name**—The first and last name of the student.
- **DOB**—The student's date of birth.
- **Change**—The type of change reported on the student's record. If new information was reported on a student's loan, **Loan** will appear in the text box. **Loan** is a link to the Loan Detail page of the loan that had a change reported. If new information was reported on a student's Pell Grant, **Pell** will appear in the text box. **Pell** is a link to the Pell Grant History page for the student.
- **Reviewed**—Indicates to other users at your school that this information was reviewed. Clicking the check box and then clicking **Submit** indicates that you have reviewed the change immediately to the left of the box. The check boxes determine whether the change information is listed in the top section of the list or the section following (i.e., check boxes without check marks appear at the top of the list.)
- **Date Alerted**—The date on which the NSLDS alerted the school of the change to the student's record.
- **Enrollment Begin Date**—The date on which the school reported that the student is expected to, or did begin classes at the school.
- **Monitor Begin Date**—The date on which the NSLDS began monitoring the student.

To use **Sort By** and **Display Only** at the top of the page (Figure 3-48):

1. In the **Sort By** list, click how the list should be sorted. The default sort is Non-reviewed records in alphabetical order by last name, then Reviewed records in alphabetical order by last name. Options include: SSN, Date Alerted, Enrollment Begin Date, and Monitor Begin Date.
2. In the **Display Only** boxes, type the information that you wish to view.
3. Click **Loans Only** or **Pells Only**, if you wish to view only one type of Alert information.
4. Click **Retrieve** to view the sorted/filtered list.

**NSLDS** Menu Aid Org Report Tran

Transfer Monitoring List | **Monitoring Alert Review** | School Transfer Profile

Logged on as: JOHN KARIS from ELON COLLEGE

### Monitoring Alert Review

Monitoring Results as of : 09/18/2001

Sort By:

Display Only: SSN:  Last Name:

Date Alerted:  Enrollment Begin Date:

☐ Loans Only ☐ Pells Only


| SSN         | Name               | DOB        | Change               | Reviewed                            | Date Alerted | Enrollment Begin Date | Monitor Begin Date |
|-------------|--------------------|------------|----------------------|-------------------------------------|--------------|-----------------------|--------------------|
| 570-98-8111 | WARREN PEESE       | 01/02/1961 | <a href="#">Loan</a> | <input type="checkbox"/>            | 05/15/2001   | 03/12/2000            | 10/12/2000         |
|             |                    |            | <a href="#">Pell</a> | <input type="checkbox"/>            | 05/15/2001   | 03/12/2000            | 10/12/2000         |
| 556-88-1003 | ANDREW SINGH       | 08/08/1968 | <a href="#">Pell</a> | <input type="checkbox"/>            | 05/15/2001   | 01/12/2001            | 10/12/2000         |
| 645-98-8103 | BEN STARR          | 12/10/1966 | <a href="#">Loan</a> | <input type="checkbox"/>            | 02/12/2004   | 01/18/2001            | 10/18/2000         |
|             |                    |            | <a href="#">Loan</a> | <input type="checkbox"/>            | 02/12/2004   | 01/18/2001            | 10/18/2000         |
| 987-65-4321 | KUTRIANA VON FLORA | 03/11/1981 | <a href="#">Pell</a> | <input type="checkbox"/>            | 05/15/2001   | 06/01/2001            | 10/12/2000         |
| 570-98-8111 | WARREN PEESE       | 01/02/1961 | <a href="#">Loan</a> | <input checked="" type="checkbox"/> | 05/15/2001   | 03/12/2000            | 10/12/2000         |

PRIVACY ACT OF 1974 (AS AMENDED)




Figure 3-48, Monitoring Alert Review

To review new information on a loan or Pell Grant under the **Change** column (Figure 3-48):

1. Click **Loan** (if applicable) to view the new information on the Loan Detail page (Figure 3-49).




[Menu](#)
[Aid](#)
[Org](#)
[Report](#)
[Tran](#)


[Loan History](#) | [Overpayment History](#) | [Pell Grant](#) | [Enrollment History](#) | [Enrollment Update](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TALLADEGA COLLEGE](#)


[Return To Loan History](#)




**TARA MARIE M NUNEZ**  
 SSN: 043-90-6703      DOB: 02/16/1975


**Detail for Loan 2**


|                                |   |                               |     |
|--------------------------------|---|-------------------------------|-----|
| <b>Loan Type:</b>              | SF - FFEL STAFFORD SUB                      |                               |     |
| <b>Loan Period Start:</b>      | 08/29/1995                                  | <b>Academic Level:</b>        | 3   |
| <b>Loan Period End:</b>        | 05/16/1996                                  | <b>Data Provider Loan ID:</b> | N/A |
| <b>Date Entered Repayment:</b> | 11/22/1997                                  | <b>Separate Loan Ind:</b>     | A   |
| <b>Borrowed at OPEID:</b>      | 00258900                                    | <b>Interest Rate:</b>         | VAR |
| <b>Borrowed at Name:</b>       | <a href="#">UNIVERSITY OF NEW HAMPSHIRE</a> |                               |     |


**Amounts for Loan 2**


|                                       | Date       | Amount  |
|---------------------------------------|------------|---------|
| <b>Loan:</b>                          | 07/17/1995 | \$5,500 |
| <b>Outstanding Principal Balance:</b> | 09/30/1995 | \$5,500 |
| <b>Outstanding Interest:</b>          | 09/30/1995 | \$0     |


**Activity for Loan 2**

| Action Date          | Amount  |
|----------------------|---------|
| <b>Disbursements</b> |         |
| 01/04/1996           | \$2,750 |
| 08/16/1995           | \$2,750 |


**Status Changes for Loan 2**

| Date Changed | Status                         |
|--------------|--------------------------------|
| 08/29/1995   | ID : IN SCHOOL OR GRACE PERIOD |


**Guaranty Agency / Lender / Servicer Agent History**

| Start                  | End     | Code   | Name  |
|------------------------|---------|--------|---|
| <b>Guaranty Agency</b> |         |        |   |
| 07/17/1995             | CURRENT | 733    | <a href="#">NEW HAMPSHIRE HIGHER EDUCATION ASST.</a>    |
| <b>Lender</b>          |         |        |   |
| 07/17/1995             | CURRENT | 827288 | <a href="#">FIRST SAVINGS &amp; LOAN ASSOC. OF N.H.</a> |



[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-49, Loan Detail

- Click **Pell** (if applicable) to view the new information on the Pell Grant History page (Figure 3-50).

NSLDS Menu Aid Org Report Tran

Loan History | Overpayment History | **Pell Grant** | Enrollment History | Enrollment Update

SSN: [ ] First Name: [ ] DOB: [ ] (MMDDCCYY) Retrieve

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE](#)

JEANNINE A MARULLO  
SSN: 043-78-2588 DOB: 01/08/1955

Student is on your school's Transfer Monitoring List.

Student Monitoring Detail

**Pell Grant History**

| Award Year  | Scheduled Amount                                       | Award Amount | Disbursed Amount | Remaining Amount | % Scheduled Used | As of Date          | Tran |
|-------------|--|--------------|------------------|------------------|------------------|---------------------|------|
| 1995 - 1996 | \$690  | N/A          | \$259            | \$0              | 37.54            | 03/19/1996          | 04   |
|             | <a href="#">UNIVERSITY OF MAINE - MACHIAS 00205500</a> |              |                  |                  | EFC: 1638        | <b>Ver. Flag:</b> R |      |
| 1994 - 1995 | \$1,350  | N/A          | \$675            | \$0              | 50.00            | 12/23/1994          | 06   |
|             | <a href="#">UNIVERSITY OF MAINE - AUGUSTA 00676000</a> |              |                  |                  | EFC: 979         | <b>Ver. Flag:</b> R |      |
| 1993 - 1994 | \$1,750  | N/A          | \$437            | \$438            | 50.00            | 12/14/1993          | 01   |
|             | <a href="#">UNIVERSITY OF MAINE - MACHIAS 00205500</a> |              |                  |                  | EFC: 572         | <b>Ver. Flag:</b> A |      |

[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

Figure 3-50, Pell Grant History

- To return to the Monitoring Alert Review page (Figure 3-48), click the **Back** button on your Internet Explorer or Netscape browser.
- Click the corresponding check mark box on the right under the **Reviewed** column.
- Click **Submit** to re-order the list.

**Notes:**

- Clicking the link in the Change box will not automatically place a check mark in the Reviewed box. To place a check mark in the Reviewed box when reviewing online, you must manually click it and then click **Submit**.
- If the school designated that Alerts be sent via Web and Batch, those records sent in the batch Alert file will automatically have check marks in the Reviewed boxes.
- The Monitoring Alert Review page can be viewed without accessing the student's record to view the change reported. The Batch Alert file cannot be viewed without reviewing the change information because it is the batch file.


### 3.7.3 School Transfer Profile

The School Transfer Profile page (Figure 3-51) displays information about the school contact for the Transfer Monitoring process. It shows how the school is set up to submit Inform files and receive Alert notifications. This information is provided and updated by school users and must be completed prior to submitting the school's first Inform.




The School Transfer Profile information is defined as follows:

- **First Name**—The first name of the school's contact.
- **Last Name**—The last name of the school's contact.
- **Title**—The title of the school's contact.
- **Phone**—The phone number of the school's contact.
- **E-Mail**—The e-mail address provided by the school to receive Alert notification messages, which could be set up at the school as a group e-mail.
- **Inform**—Designated Title IV WAN mailbox for the servicer. Schools that do not use a servicer to submit batch files will leave this text box blank.
- **Alert**—Indicates how the school requested its Alert to be sent; either via the Web Only or via Web and Batch files through the Title IV WAN.
- **Title IV WAN Mailbox**—Designated Title IV WAN mailbox for Alerts. A TG number in this text box indicates that the school designated Web and Batch as its output option for Alerts. If this text box is not present, the school designated Web only.
- **Batch Alert Method**—If the school requested Web and Batch alerts, in addition to providing a Title IV WAN mailbox number, the school must select an Alert format. Extract indicates that the school requested the Alerts as a data file; Report indicates that the school requested the Alerts be in a report format. If this text box is not present, the school designated Web Only.
- **Last Updated By**—The name of the user who last updated the school's Transfer Profile, and the date of the update.

To update the School Transfer Profile information, click **Update**.



[Menu](#) [Aid](#) [Org](#) [Report](#) [Tran](#)

[Transfer Monitoring List](#) | [Monitoring Alert Review](#) | **[School Transfer Profile](#)**

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE](#)

### School Transfer Profile

Update

**First Name:** BRUCE  
**Last Name:** TAYLOR  
**Title:** MR.  
**Phone:** 703-560-5000   **Ext:** 5455  
**E-Mail:** btaylor@raytheon.com  
**Inform:**  
**Alert:** Web Only  
**TIV WAN Mailbox:**      **Batch Alert Method:**  
**Last Update By:** DUMMY SCHOOL ID FOR TRAINING on 07/24/2001

Figure 3-51, School Transfer Profile

### 3.7.3.1 School Transfer Profile Add

The School Transfer Profile Add page (Figure 3-52) allows you to add School Transfer Profile information. You must complete this page before submitting your first Inform information.


To add a School Transfer Profile:

1. In the **First Name** box, type the first name of the school's contact.
2. In the **Last Name** box, type the last name of the school's contact.
3. In the **Title** box, type the title of the school's contact.
4. In the **Phone** and **Ext** boxes, type the phone number and extension of the school's contact.
5. In the **E-Mail** box, type the e-mail address designated to receive Alert notification messages, which could be set up at the school as a group e-mail.
6. In the **Inform** box, type the Title IV WAN mailbox from which the school's designated servicer will be submitting Inform files. Schools that do not use a servicer to submit batch Inform files will leave this text box blank.
7. In the **Alert** boxes, select how you want your school's Alert information to be sent (i.e., via Web Only or Web and Batch files through the Title IV WAN). If you select Web and Batch, you must then provide a Title IV WAN Mailbox (TG number.)
8. In the **Batch and Alert Method** box, select an Alert format: Extract or Report. Extract indicates that you want Alerts as a data file; Report indicates you want the Alerts in a report format. If you selected Web Only, leave these text boxes blank.
9. Click **Submit**.




#### Notes:

- After the School Transfer Profile has been added, your name and the date will appear on the School Transfer Profile page in Last Update By.
- If you attempt to add a student to your school's Transfer Monitoring List via batch file before completing this page, the NSLDS will send back an error file. If you attempt to add a student to your school's Transfer Monitoring List via this Web site before completing this page, you will be re-directed to this page.
- This page only displays once. After this page is completed, use the School Transfer Profile Update page to make any updates.





[Menu](#) [Aid](#) [Org](#) [Report](#) [Tran](#)

[Transfer Monitoring List](#) | [Monitoring Alert Review](#) | [School Transfer Profile](#)

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [TROY STATE UNIVERSITY AT MONTGOMERY](#)

First Name:

Last Name:

Title:

Phone:  Ext:

E-Mail:

Inform: Designated Batch TIV WAN Mailbox for Servicer (Optional):

Alert: ☐ Web Only

☐ Web and Batch File TIV WAN Mailbox:

Batch Alert Method: ☐ Extract ☐ Report

Figure 3-52, School Transfer Profile Add

### 3.7.3.2 School Transfer Profile Update


The School Transfer Profile Update page (Figure 3-53) allows you to update the School Transfer Profile information.

To update the School Transfer Profile:

1. In the **First Name** box, type the first name of the school's contact.
  2. In the **Last Name** box, type the last name of the school's contact.
  3. In the **Title** box, type the title of the school's contact.
  4. In the **Phone** and **Ext** boxes, type the phone number and extension of the school's contact.
  5. In the **E-Mail** box, type the e-mail address designated to receive Alert notification messages, which could be set up at the school as a group e-mail.
  6. In the **Inform** box, type the Title IV WAN mailbox from which the school's designated servicer will be submitting Inform files. Schools that do not use a servicer to submit batch Inform files will leave this text box blank.
  7. In the **Alert** boxes, select how you want your school's Alert information to be sent (i.e., via Web Only or Web and Batch files through the Title IV WAN). If you select Web and Batch, you must then provide a Title IV WAN Mailbox (TG number.)
  8. In the Batch and Alert Method box, select an Alert format: Extract or Report. Extract indicates that you want Alerts as a data file; Report indicates you want the Alerts in a report format. If you selected Web Only, leave these text boxes blank
- Batch file layouts for the Inform, Error/Acknowledgement, and Alert files can be found at <http://www.ifap.ed.gov/eannouncements/attachments/0628MonitoringProcess.pdf>.*
9. Click **Submit**.

**Note:**


In Last Updated By, the name of the user who last updated the School Transfer Profile and the date of the last School Transfer Profile update appear.



MenuAidOrgReportTran

Transfer Monitoring List | Monitoring Alert Review | School Transfer Profile

Logged on as: DUMMY SCHOOL ID FOR TRAINING from RUTGERS THE STATE UNIVERSITY OF NEW JERSEY CENTRAL OFFICE

Return To School  
Transfer Profile

**School Transfer Profile Update**

First Name:

Last Name:

Title:

Phone:  Ext:

E-Mail:

Inform: Designated Batch TIV WAN Mailbox for Servicer (Optional):

Alert: ☒ Web Only  
☐ Web and Batch File TIV WAN Mailbox:

Batch Alert Method: ☐ Extract ☐ Report

Last Update By: DUMMY SCHOOL ID FOR TRAINING on 07/24/2001

Submit

Figure 3-53, School Transfer Profile Update

